Roadmap
Integrate Innovate Succeed

# Roadmap ERP

## Ver 14.0

# USER MANUAL

# Operating Instructions

**Part No. R14-00OPI**

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# 1. Operating Instructions

## Shortcut Keys and Icons:

| S.NO | Operation | Keys | Icons |
|---|---|---|---|
| 1 | Save | Ctrl + S | |
| 2 | Print | Ctrl + P | |
| 3 | Cut | Ctrl + X | |
| 4 | Copy | Ctrl + C | |
| 5 | Paste | Ctrl + V | |
| 6 | Enter Query | F11 | |
| 7 | Execute | Ctrl + F11 | |
| 8 | First Record | Page Up | |
| 9 | Previous Record | Up | |
| 10 | Next Record | Down | |
| 11 | Last Record | Page Down | |
| 12 | Insert | Ctrl + Down | |
| 13 | Clear | F6 | |
| 14 | Delete | Ctrl + Up | |
| 15 | History | - | |
| 16 | Help | - | |
| 17 | Keys | Ctrl + K | |
| 18 | Close Screen | F4 | |
| 19 | Drill down | Open the master data screen if the user has the access. | |
| 20 | Business function | Identifies a business function in the menu tree | |
| 21 | Calendar | To open a Calendar | |
| 22 | LOV | To open the list of values | |

# How to Login

**Step 1:**

Launch the Internet browser and enter the Roadmap ERP URL

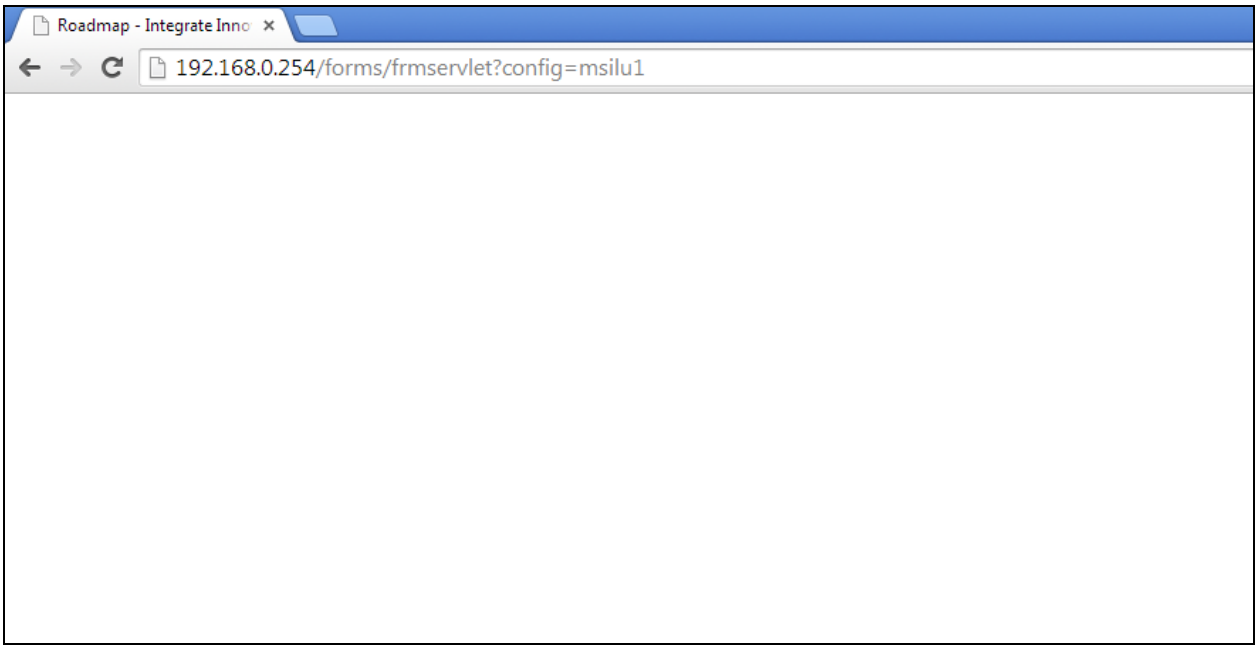



**Figure 1-1**

The login screen will appear.

**Figure 1-2**

**Steps:**

- ✓ Enter the user id
- ✓ Enter the password
- ✓ Click on **Login** to get logged into the application
- ✓ Click on the **Exit** button to exit.

On successful login, Roadmap ERP will get open followed by a menu tree with all application titles.

**Figure 1-3**

The tree is explained in the following section.

1. Expand one level of the tree
2. Expand all the nodes of the tree

3. Collapse one level of the tree
4. Collapse all the nodes of the tree
5. Refreshes the tree
6. Logout from the application
7. Exit the application
8. Approvals
9. Messages

## What is a Business Function

A business function is an interface used to

- Define master data
- Carry out day-to-day transactions
- Query
- Run a report

Each business function in Roadmap is identified by a unique business function id and description.

The business functions are grouped by nature of use and functionalities. For e.g., Purchase Request business function is identified by unique function id POM1030 and comes under Transactions in Purchase Order Module.

# How to Open a Business Function

***Option I:***

Type the unique business function id POM1060 in the search box and click on the **GO** button

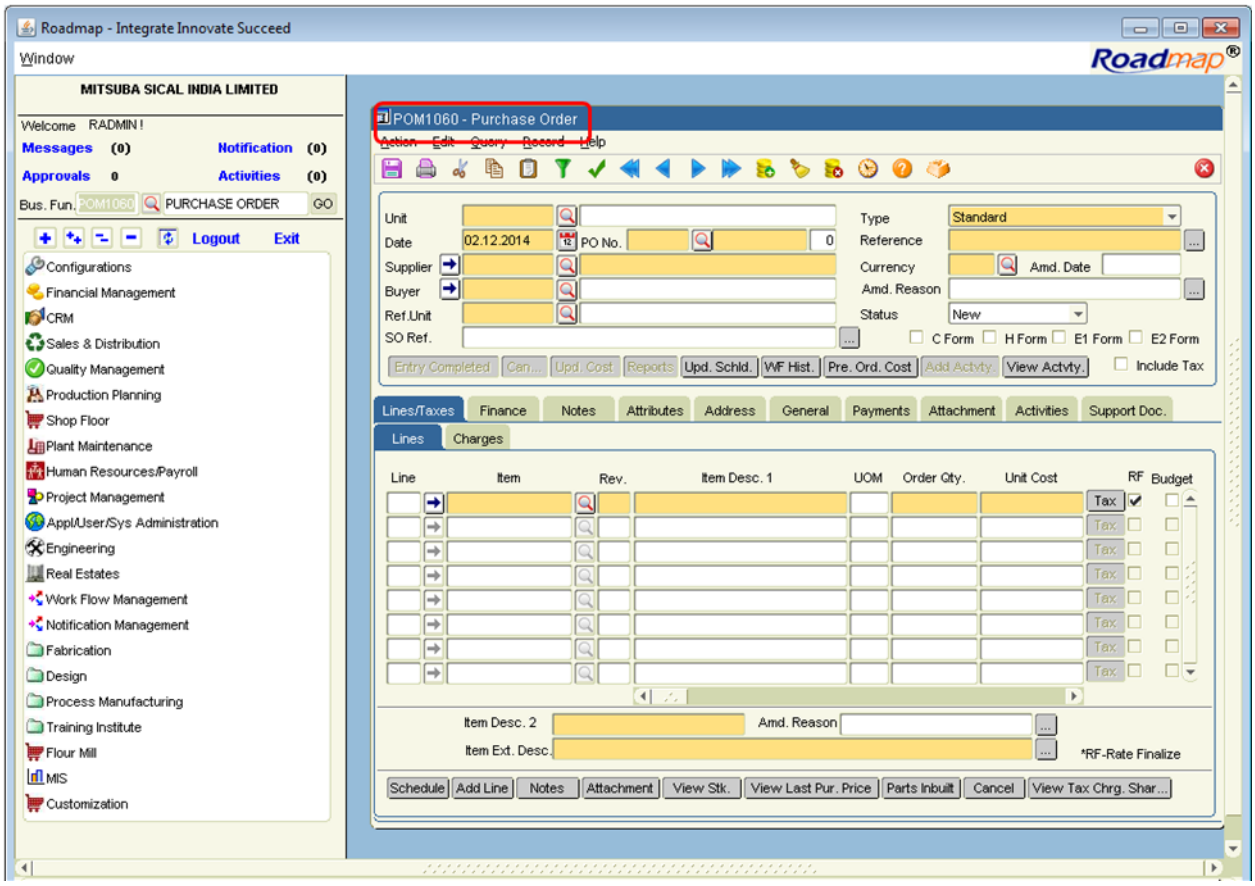



**Figure 1-4**

*Option II:*
Navigate through the tree as follows.

Click on the Sales & Distribution node in the tree

Sales & Distribution

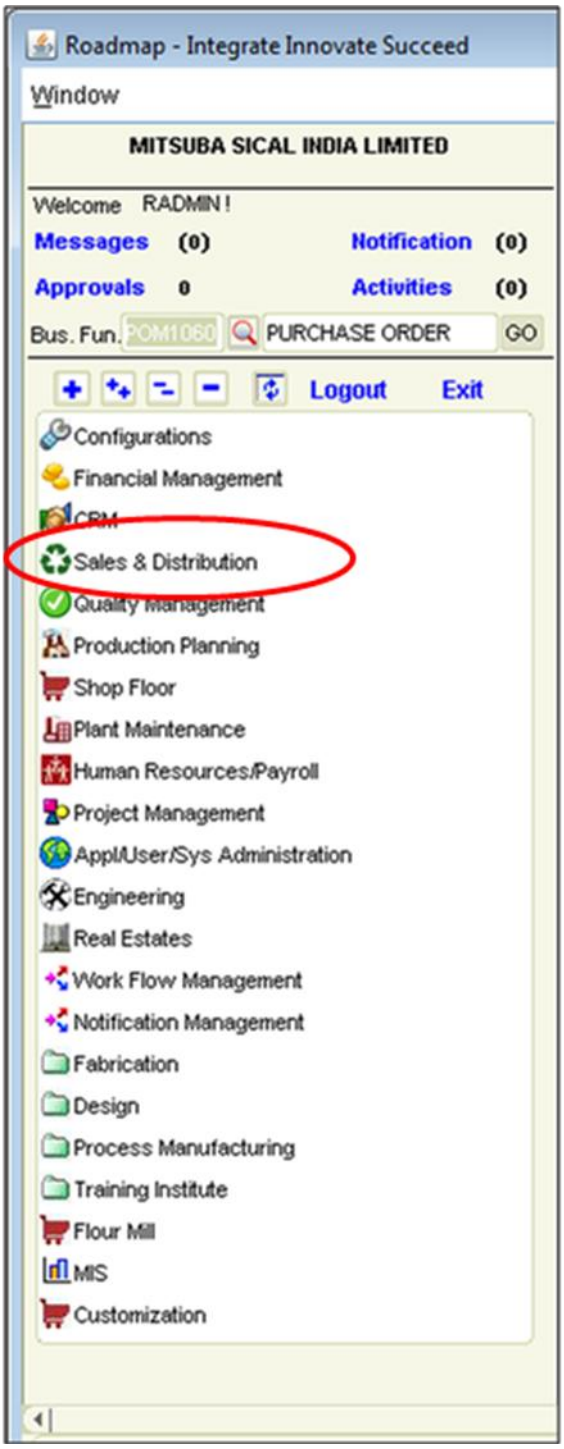



**Figure 1-5**

Click on Purchase Order \ Sales & Distribution \ Purchase Order

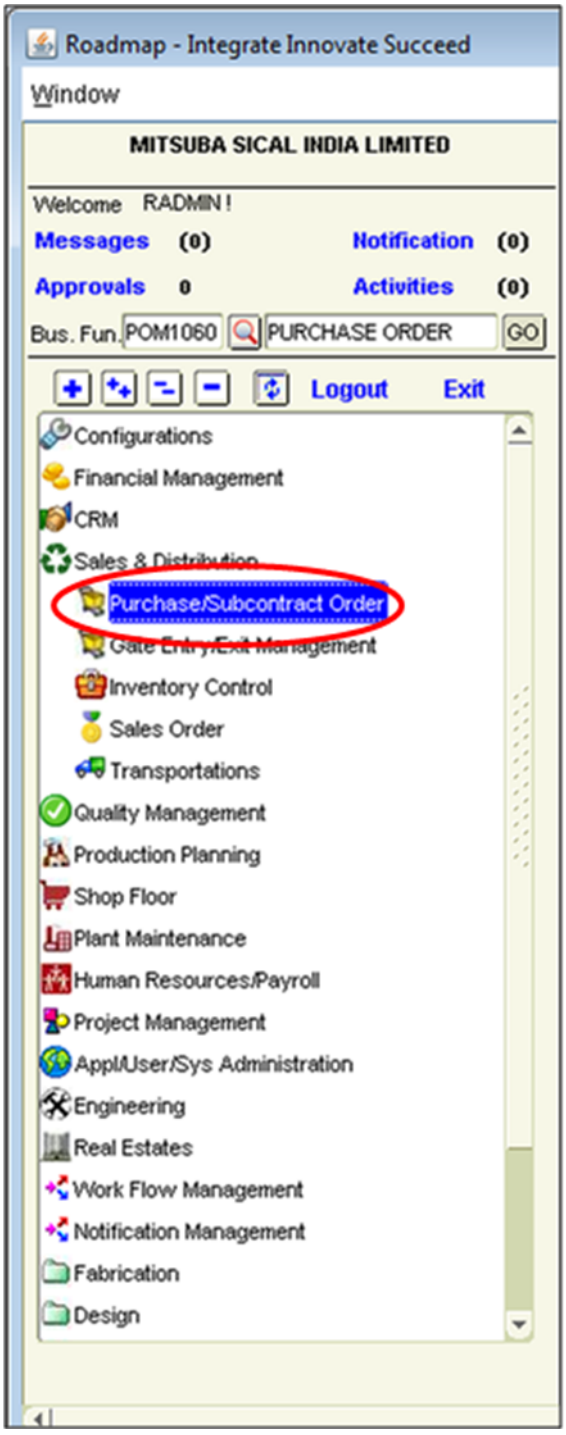



**Figure 1-6**

Click on Transactions

Sales & Distribution \ Purchase Order \ Transactions

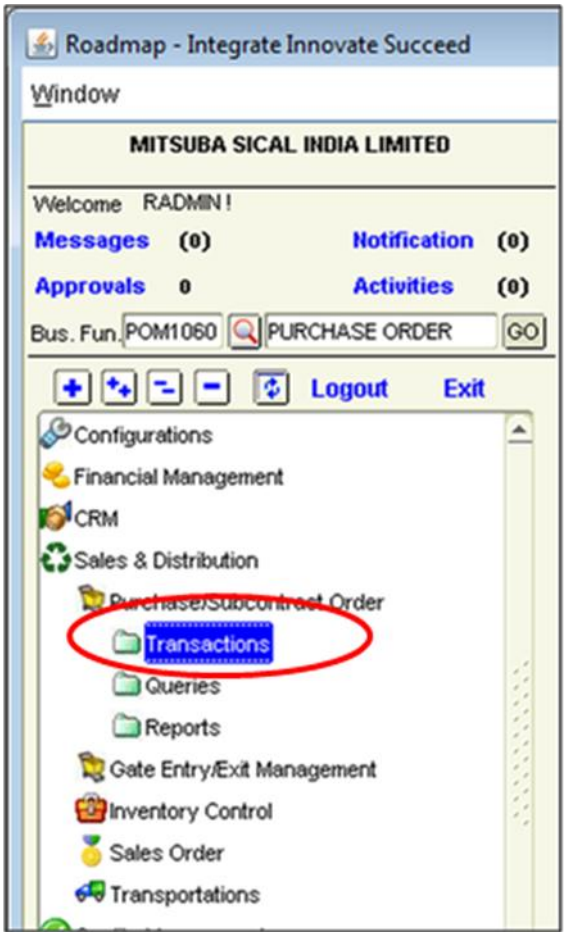



**Figure 1-7**

Click on Transactions

Sales & Distribution \ Purchase/Sub contract Order \ Transactions \ PO

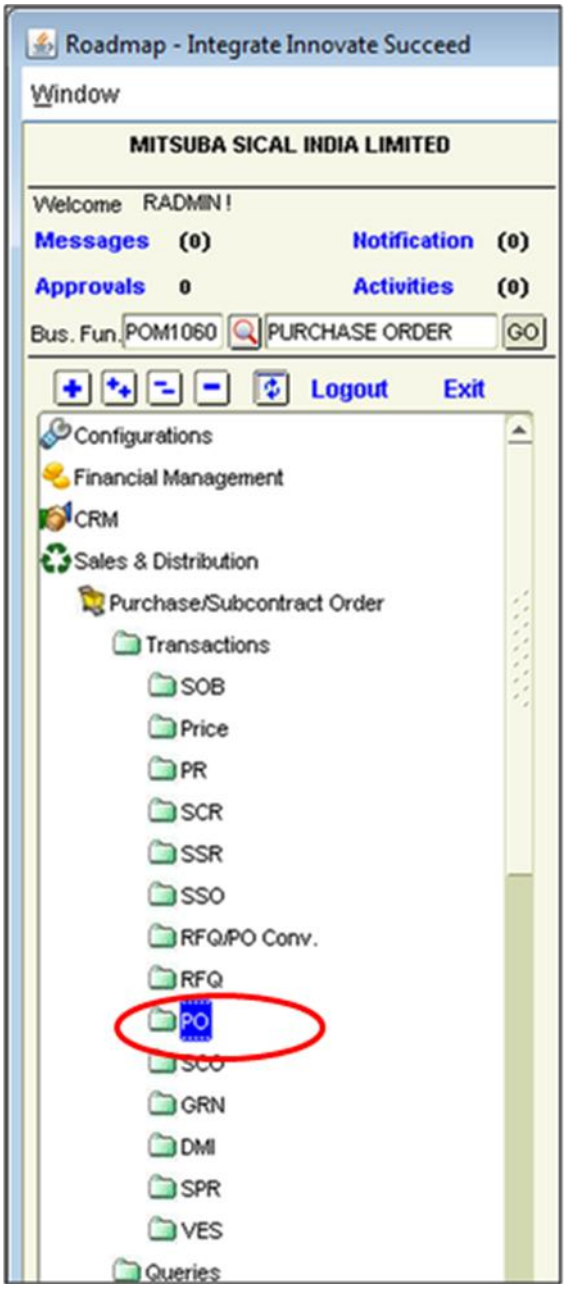



**Figure 1-8**

Click on Purchase Order

Sales & Distribution \ Purchase/Subcontract Order \ Transactions \ PO \ Purchase Order

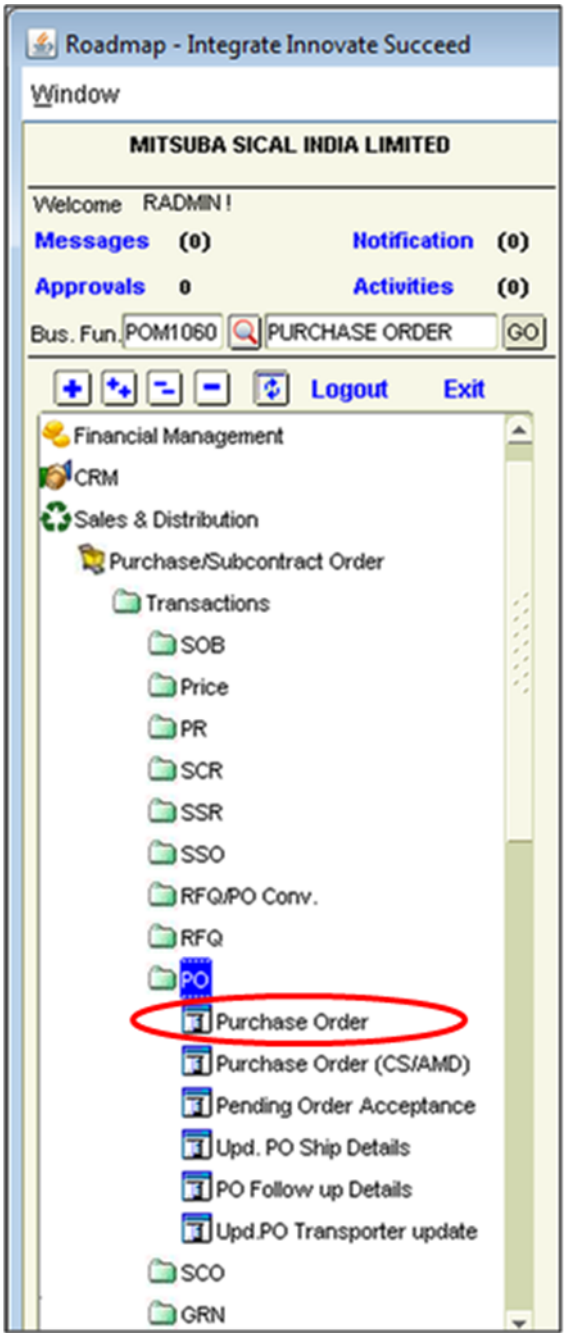



**Figure 1-9**

## How to add data

**Step 1:**
*Option I:*
Click on icon.

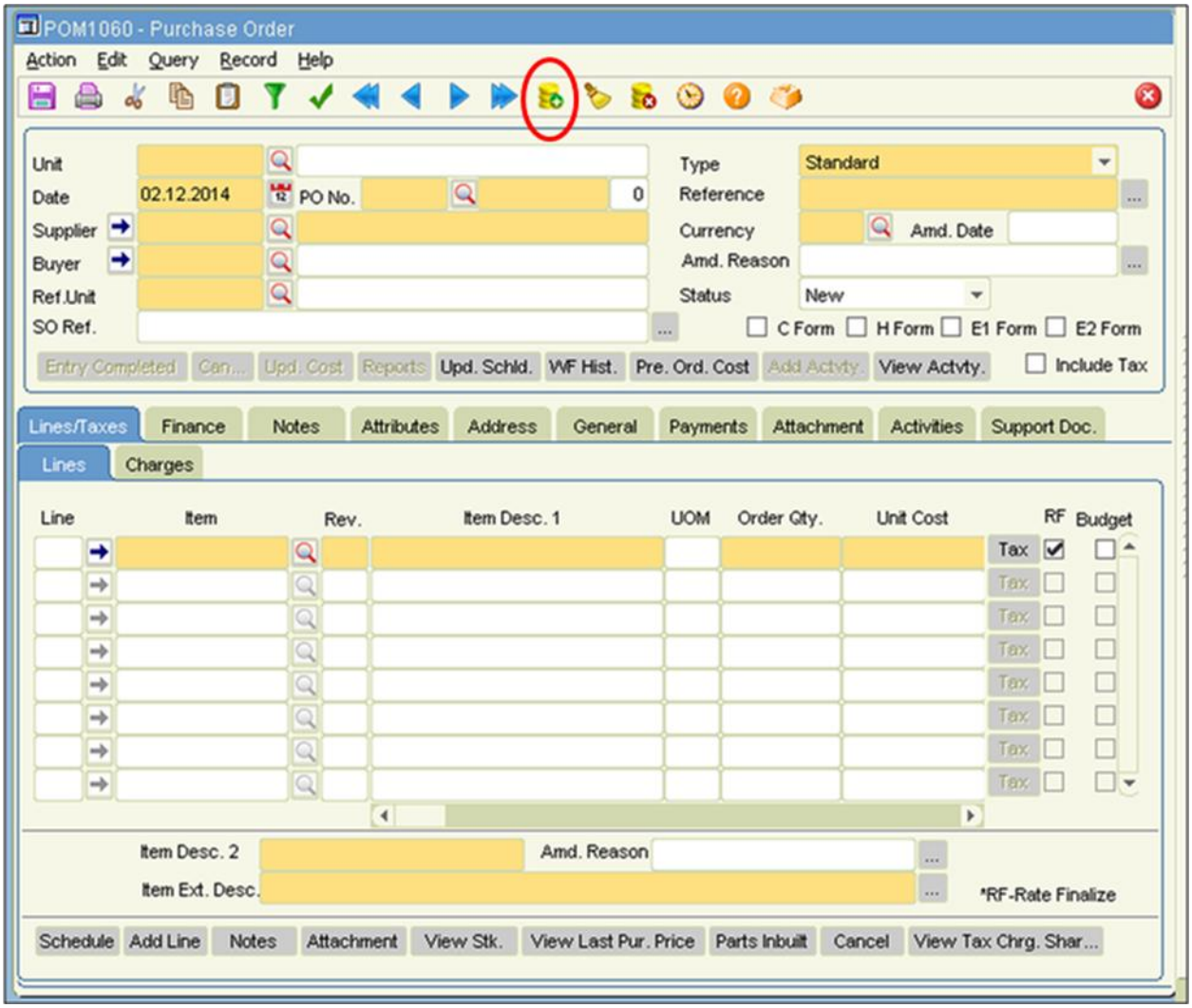

POM1060 - Purchase Order
Action Edit Query Record Help
Unit
Date 02.12.2014 PO No. 0
Supplier
Buyer
Ref.Unit
SO Ref.
Type Standard
Reference
Currency Amd. Date
Amd. Reason
Status New
C Form H Form E1 Form E2 Form
Entry Completed Can... Upd. Cost Reports Upd. Schld. WF Hist. Pre. Ord. Cost Add Actvty View Actvty. Include Tax
Lines/Taxes Finance Notes Attributes Address General Payments Attachment Activities Support Doc.
Lines Charges
Line Item Rev. Item Desc. 1 UOM Order Qty. Unit Cost RF Budget
Tax
Item Desc. 2 Amd. Reason
Item Ext. Desc.
*RF-Rate Finalize
Schedule Add Line Notes Attachment View Stk. View Last Pur. Price Parts Inbuilt Cancel View Tax Chrg. Shar...

**Figure 1-10**

*Option II:*

Navigate to the last record and make an entry after the last record.

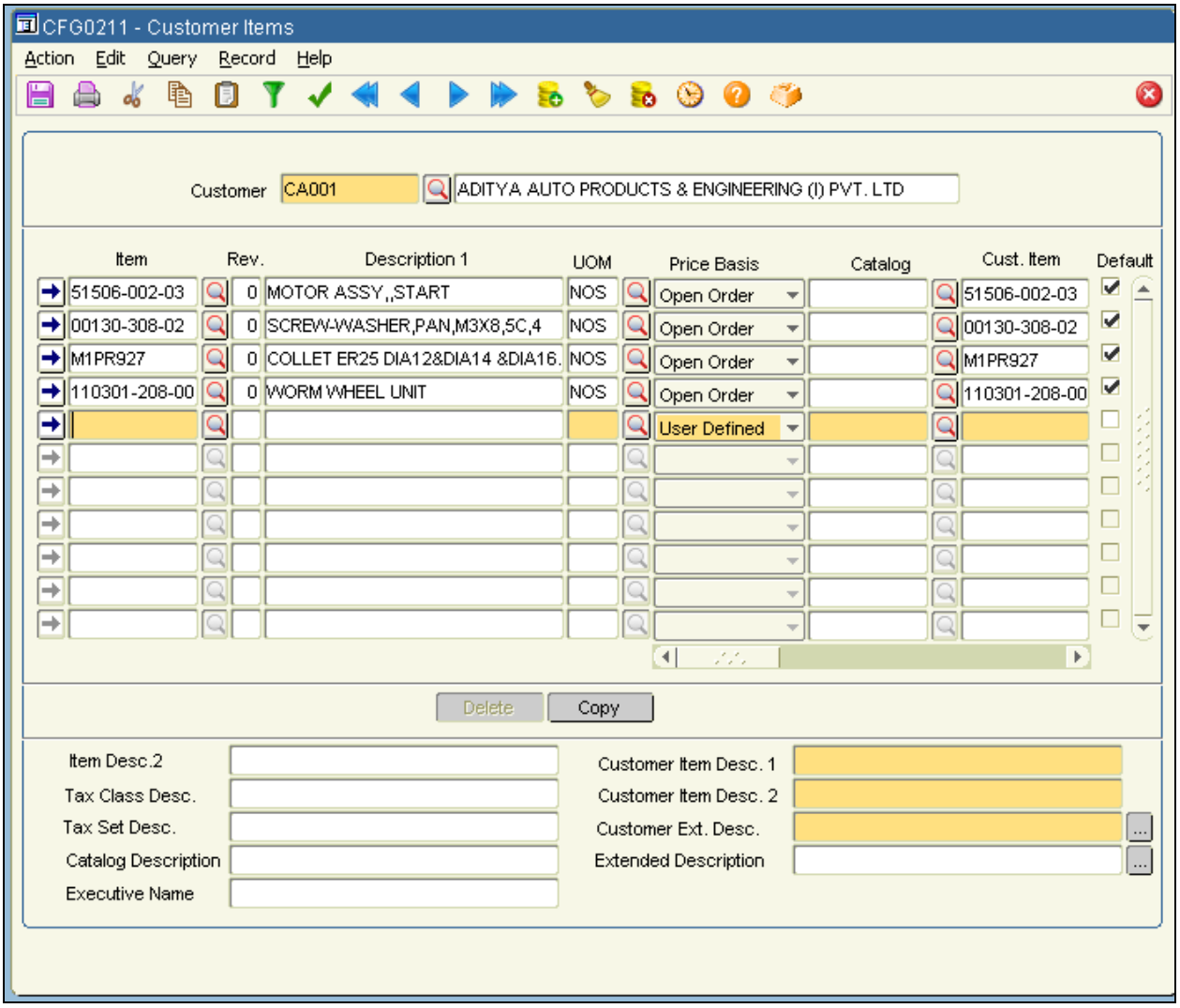

CFG0211 - Customer Items
Action Edit Query Record Help
Customer CA001 ADITYA AUTO PRODUCTS & ENGINEERING (I) PVT. LTD
Item Rev. Description 1 UOM Price Basis Catalog Cust. Item Default
51506-002-03 0 MOTOR ASSY,,START NOS Open Order 51506-002-03
00130-308-02 0 SCREW-WASHER,PAN,M3X8,5C,4 NOS Open Order 00130-308-02
M1PR927 0 COLLET ER25 DIA12&DIA14 &DIA16. NOS Open Order M1PR927
110301-208-00 0 WORM WHEEL UNIT NOS Open Order 110301-208-00
User Defined
Delete
Copy
Item Desc.2
Tax Class Desc.
Tax Set Desc.
Catalog Description
Executive Name
Customer Item Desc. 1
Customer Item Desc. 2
Customer Ext. Desc.
Extended Description

**Figure 1-11**

*Option III:*
Choose from the menu.
Record \ Insert

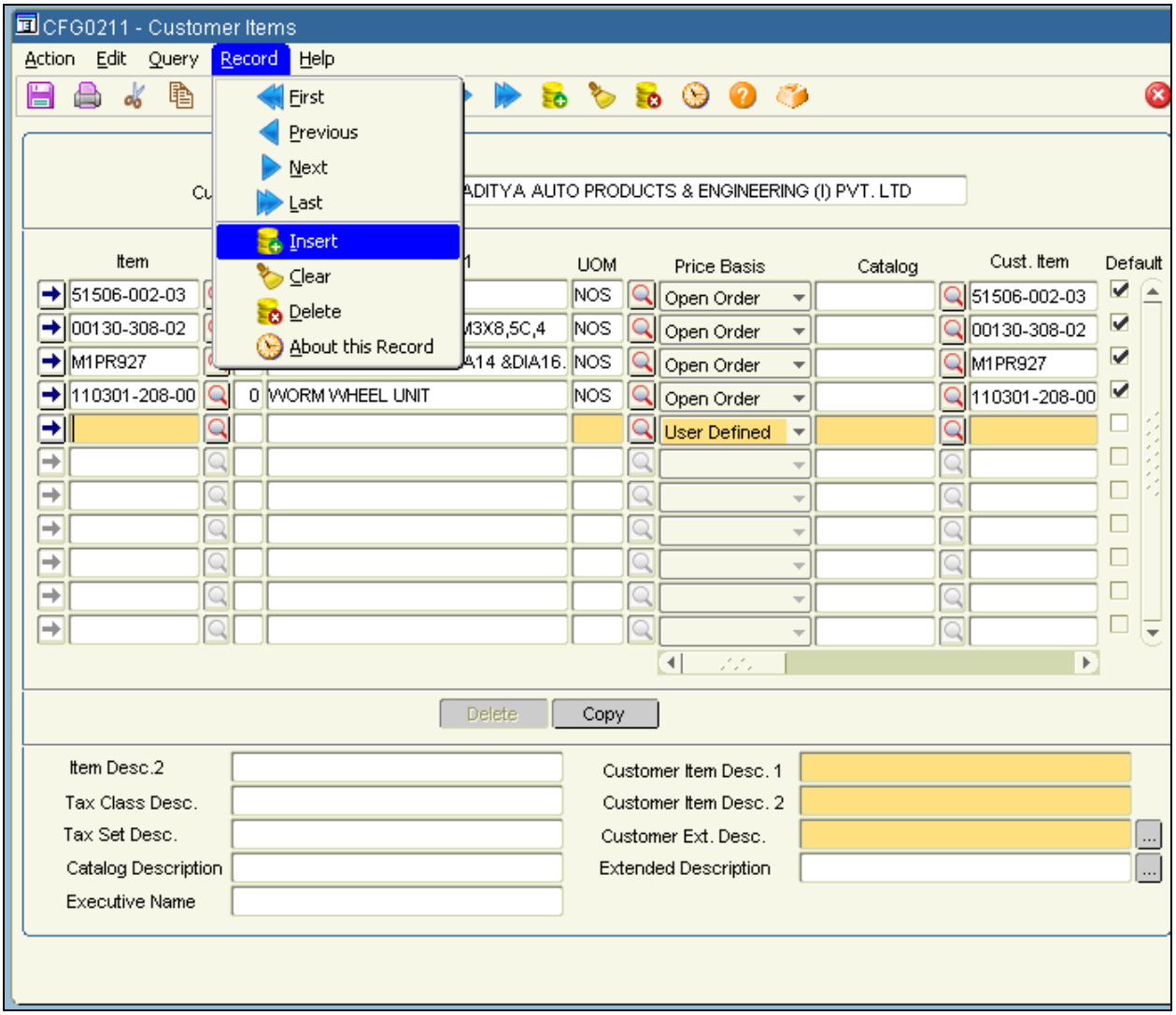



**Figure 1-12**

**Step 2:**
Enter / choose the relevant data (Refer: How to use LOV)

**Step 3:**
Save the data

## How to save data

*Option I:*
Select the save icon.

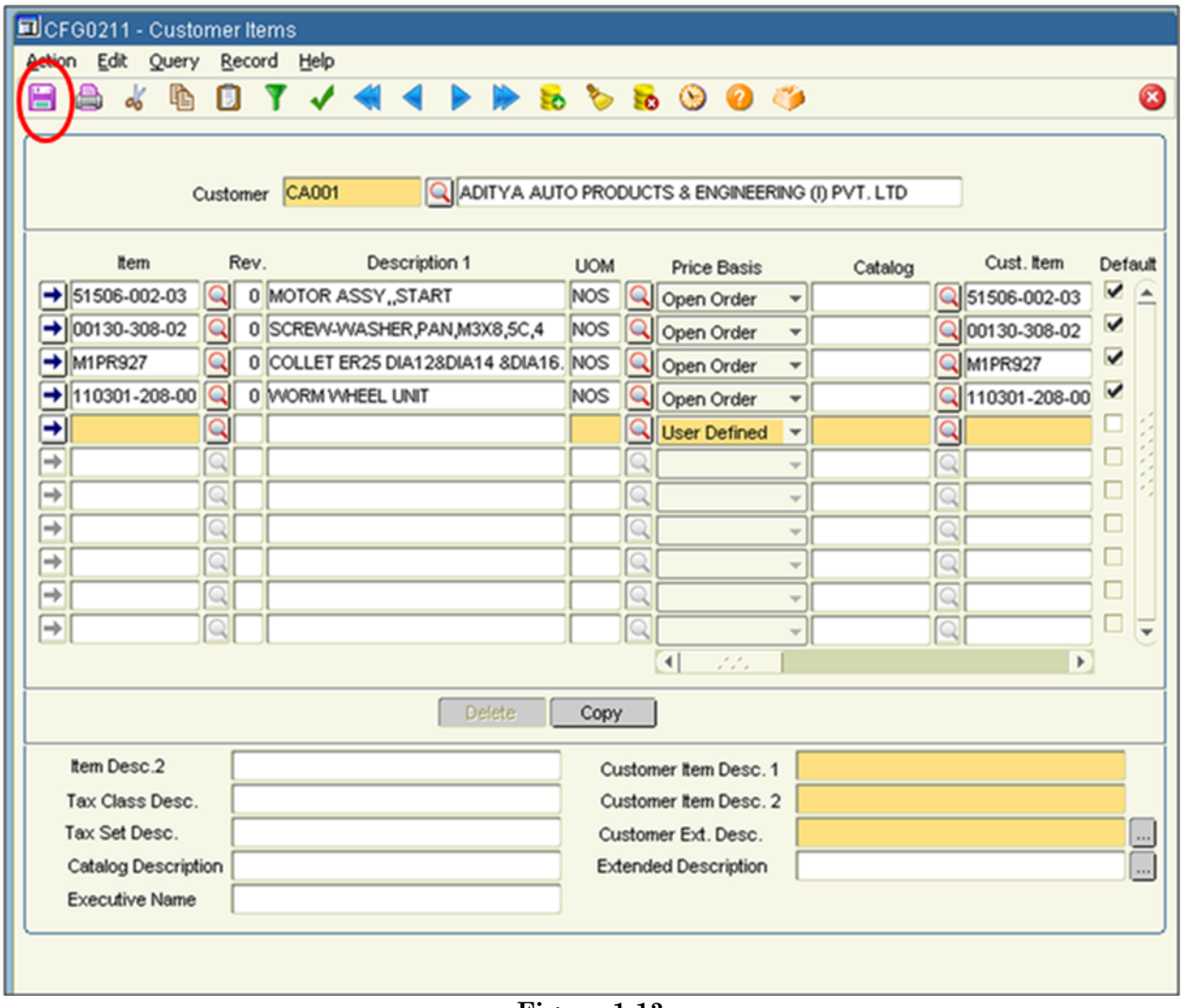

CFG0211 - Customer Items
Action Edit Query Record Help
Customer CA001 ADITYA AUTO PRODUCTS & ENGINEERING (I) PVT. LTD
Item Rev. Description 1 UOM Price Basis Catalog Cust. Item Default
51506-002-03 0 MOTOR ASSY,,START NOS Open Order 51506-002-03
00130-308-02 0 SCREW-WASHER,PAN,M3X8,5C,4 NOS Open Order 00130-308-02
M1PR927 0 COLLET ER25 DIA12&DIA14 &DIA16. NOS Open Order M1PR927
110301-208-00 0 WORM WHEEL UNIT NOS Open Order 110301-208-00
User Defined
Delete
Copy
Item Desc.2
Tax Class Desc.
Tax Set Desc.
Catalog Description
Executive Name
Customer Item Desc. 1
Customer Item Desc. 2
Customer Ext. Desc.
Extended Description

**Figure 1-13**

*Option II:*
Choose from the menu.
Action \ Save

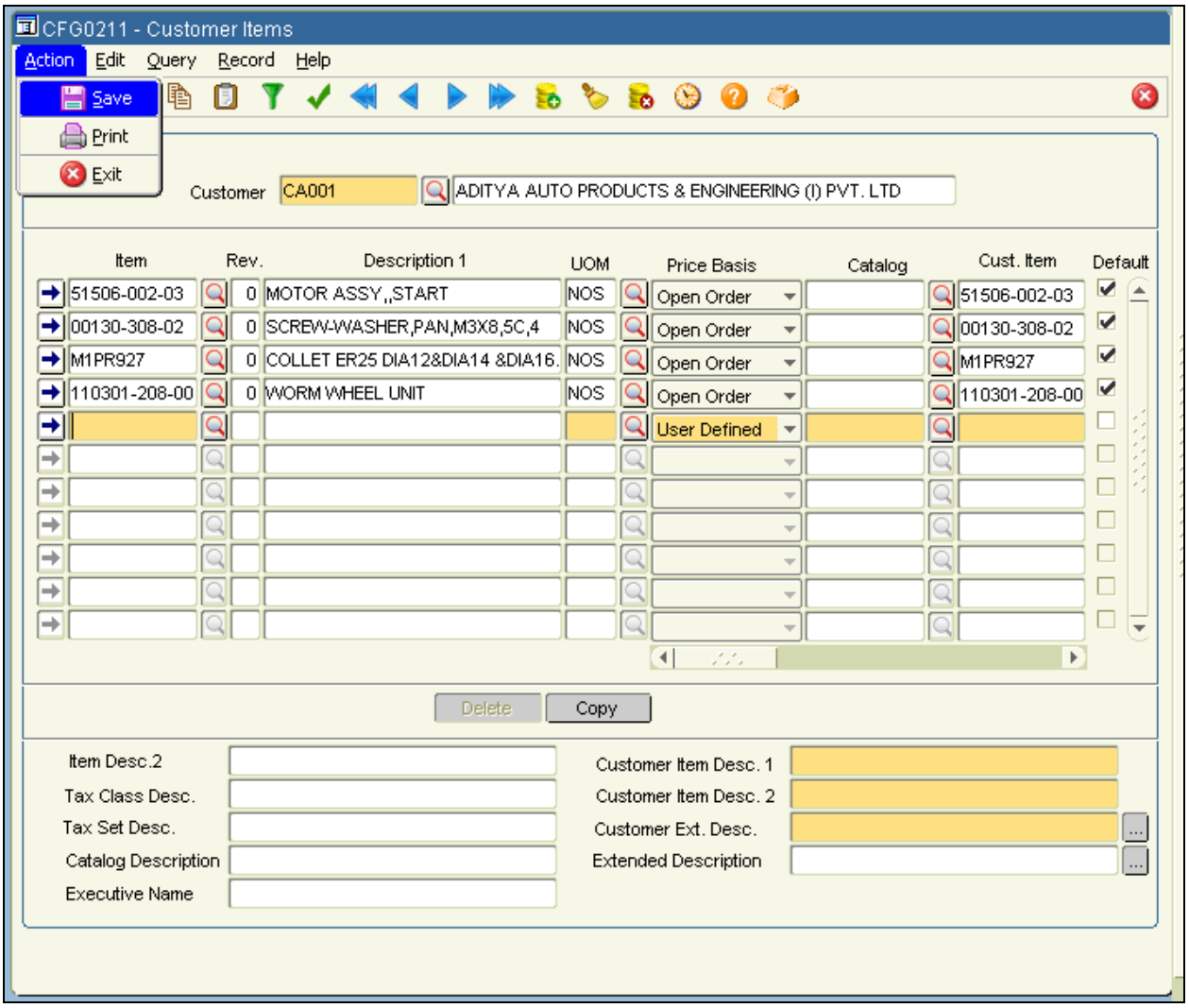



**Figure 1-14**

*Option III:*
Press Ctrl+S.

## How to Query data

Following are the steps to query an existing data.

**Step 1:**
Enter Query Mode

*Option I:*

Click on the icon

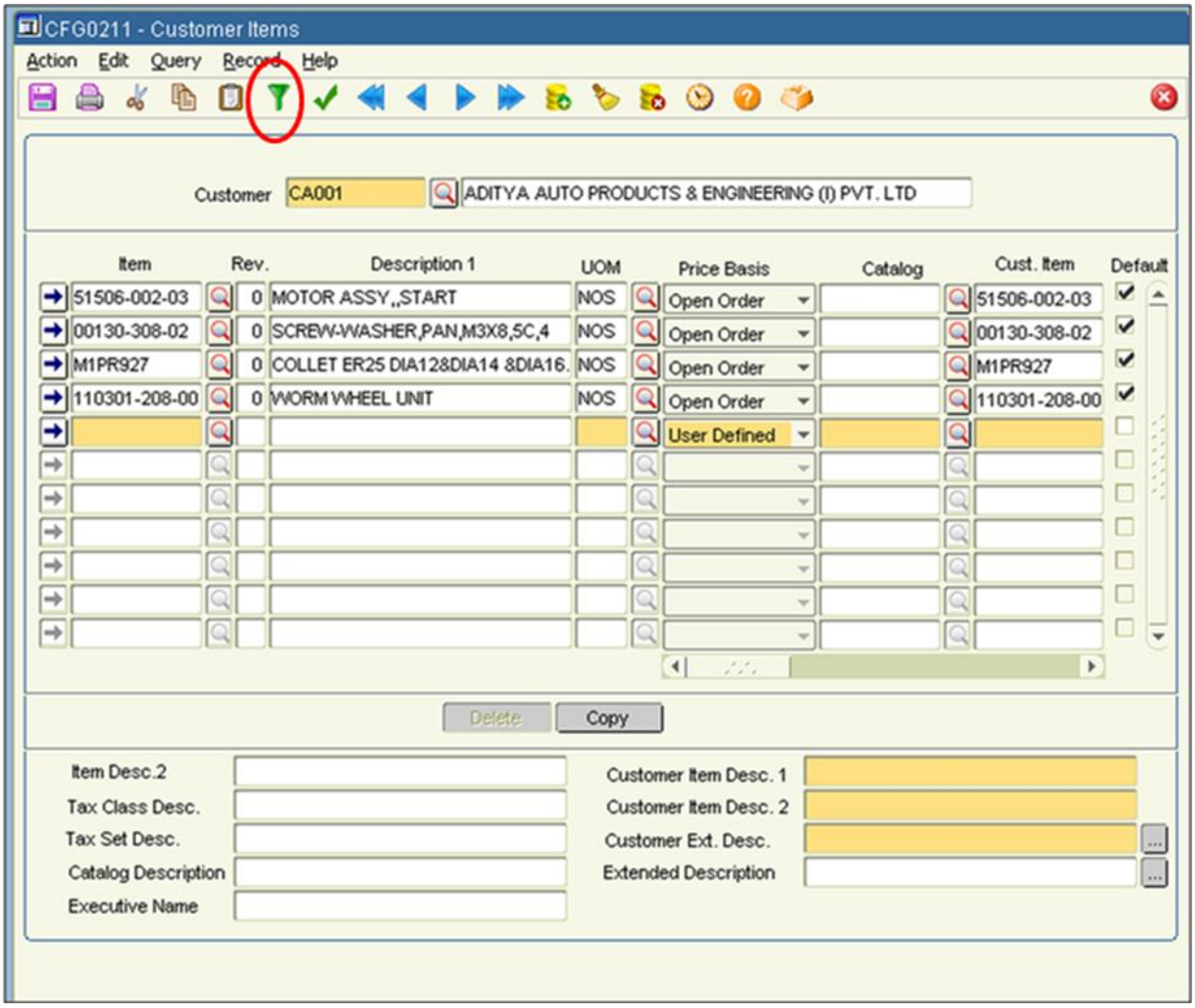

CFG0211 - Customer Items
Action Edit Query Record Help
Customer CA001 ADITYA AUTO PRODUCTS & ENGINEERING (I) PVT. LTD
Item Rev. Description 1 UOM Price Basis Catalog Cust. Item Default
51506-002-03 0 MOTOR ASSY,,START NOS Open Order 51506-002-03
00130-308-02 0 SCREW-WASHER,PAN,M3X8,5C,4 NOS Open Order 00130-308-02
M1PR927 0 COLLET ER25 DIA12&DIA14 &DIA16. NOS Open Order M1PR927
110301-208-00 0 WORM WHEEL UNIT NOS Open Order 110301-208-00
User Defined
Delete
Copy
Item Desc.2
Tax Class Desc.
Tax Set Desc.
Catalog Description
Executive Name
Customer Item Desc. 1
Customer Item Desc. 2
Customer Ext. Desc.
Extended Description

**Figure 1-15**

*Option II*:
Choose from menu.
Query \ Enter

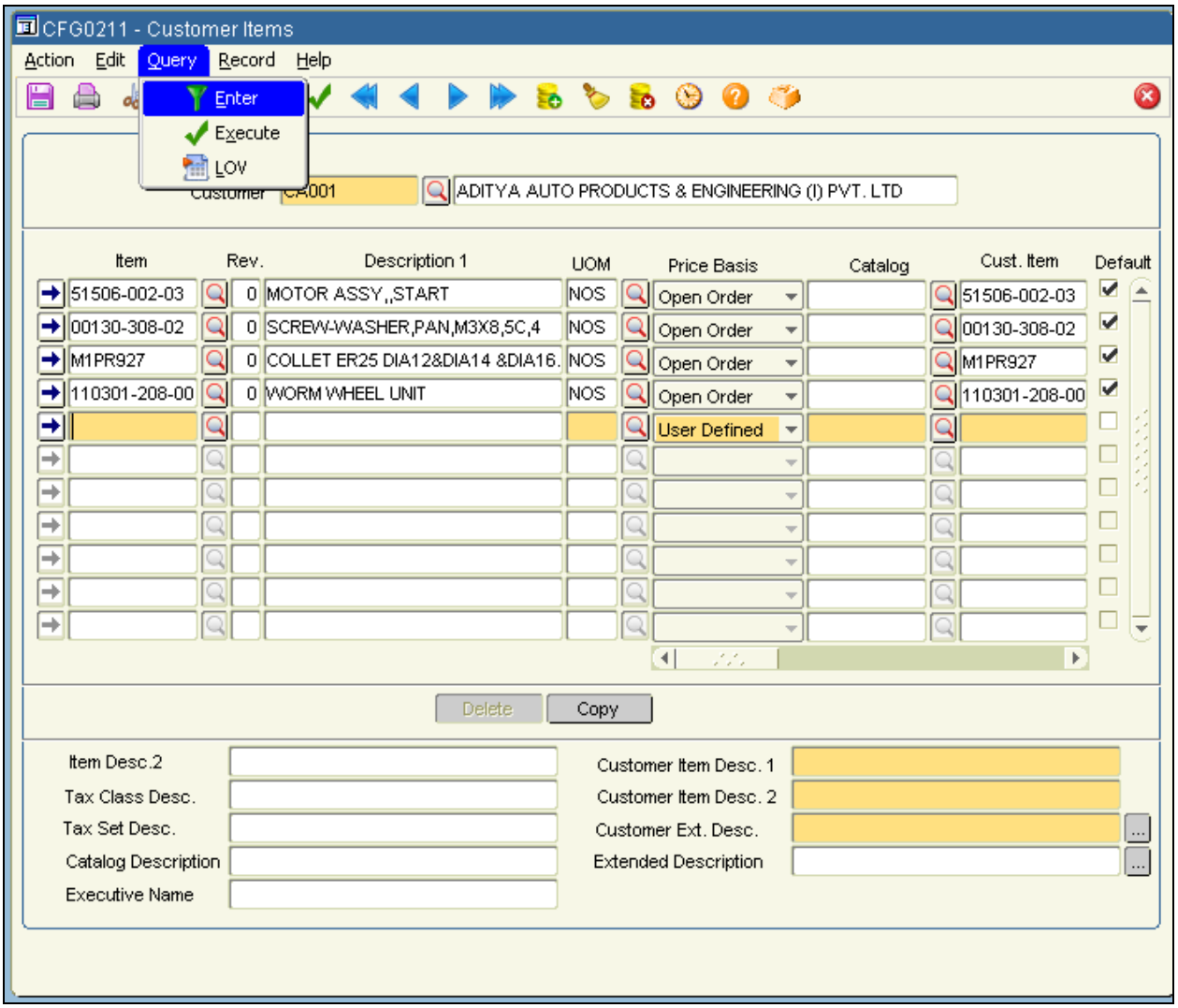



**Figure 1-16**

*Option III*:
Press key F11.

**Step 2:**
This is the enter query mode.
This mode can be cancelled by pressing the F4 button on the keyboard.

The screen is now set for querying.

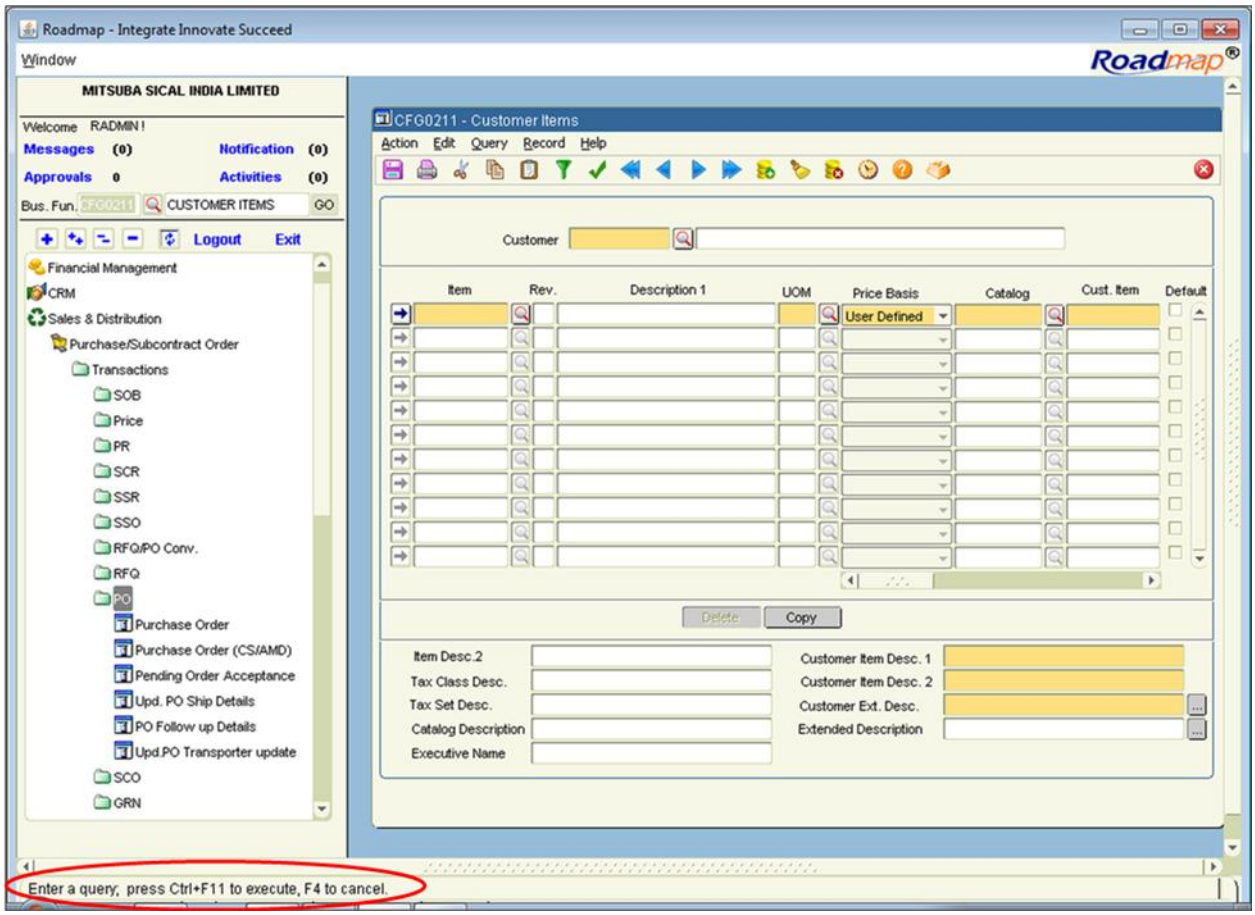



**Figure 1-17**

Type the search criteria in the relevant boxes. The search can be made using wildcards also.

Using Wildcards:

If you are unsure on part of your search details, one or more characters can be replaced by the wildcard character which is %.
% matches any number of characters.
_ matches a single character.
All records corresponding to your search criteria will be retrieved and can be browsed as usual.
You can use more than one wildcard in the same entry:

| S.NO | Wildcard | Example |
|---|---|---|
| 1 | %1 | Will list all the entries ending with `1'.<br>10001<br>1231<br>141<br>1<br>8651<br>11 |
| 2 | %1% | Will list all the entries where '1' occurs in any position.<br>1123<br>671768<br>321<br>1 |
| 3 | 100% | Will list all the entries where '1' occurs in any position.<br>1001<br>1002<br>1003<br>1004<br>100123 |
| 3 | 1%1 | Will list all the entries which start with '1' and end with '1'.<br>1231<br>101<br>11 |
| 4 | 100_5 | '_' matches a single character.<br>10015<br>10025<br>10035 |
| 5 | <> 10000 | Will list all the entries whose value is not 10000 |
| 6 | > 10000 | Will list all the entries whose value is greater than 10000 |
| 7 | < 10000 | Will list all the entries whose value is less than 10000 |
| 8 | 03.05.2005 | Will list all the entries matching with this date |

### I. Wild card search (CA00%)

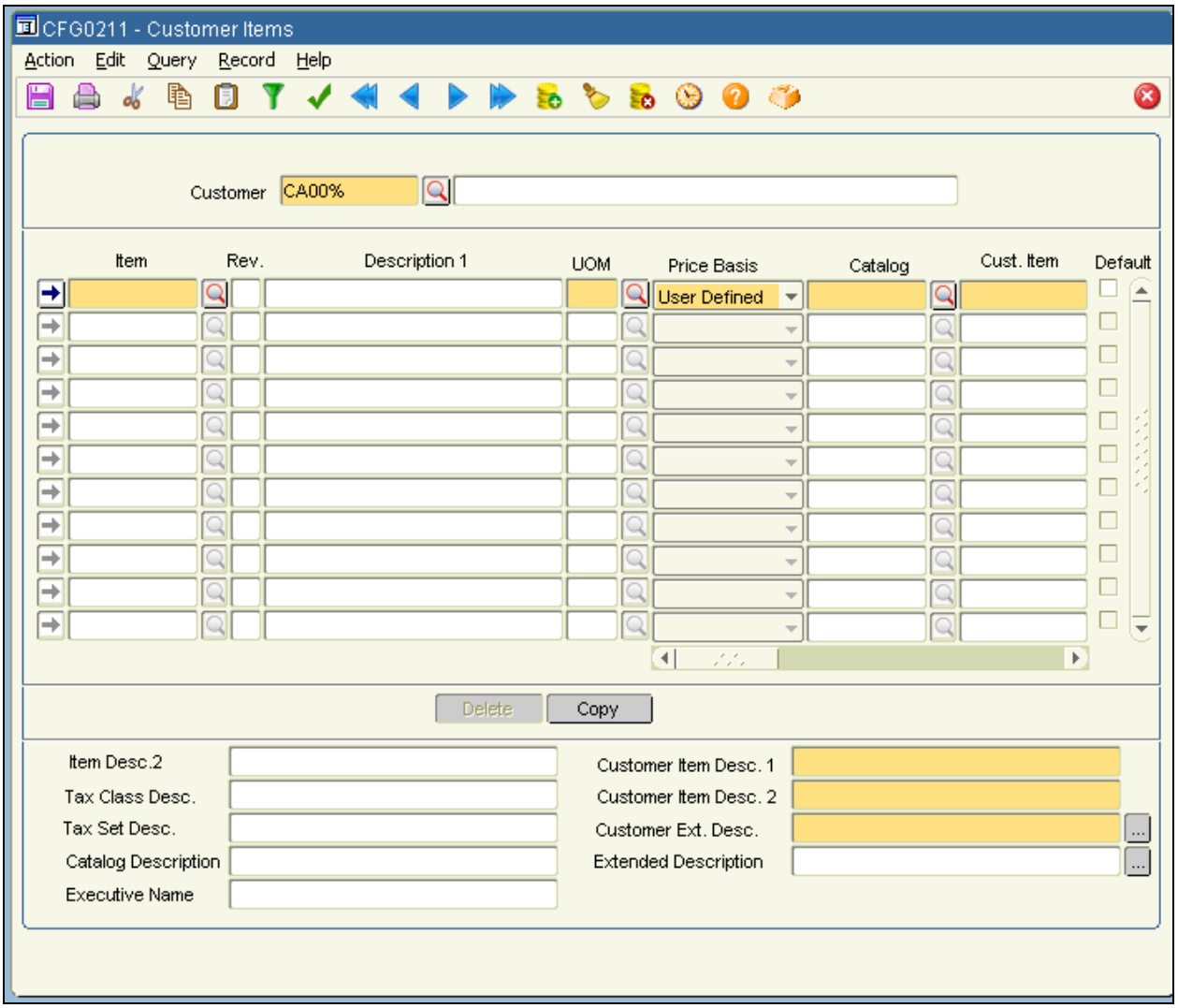



**Figure 1-18**

**Execute Query**
*Option I:*
Click on the ✔ icon.

The screen is populated with the set of records matching the search criteria.

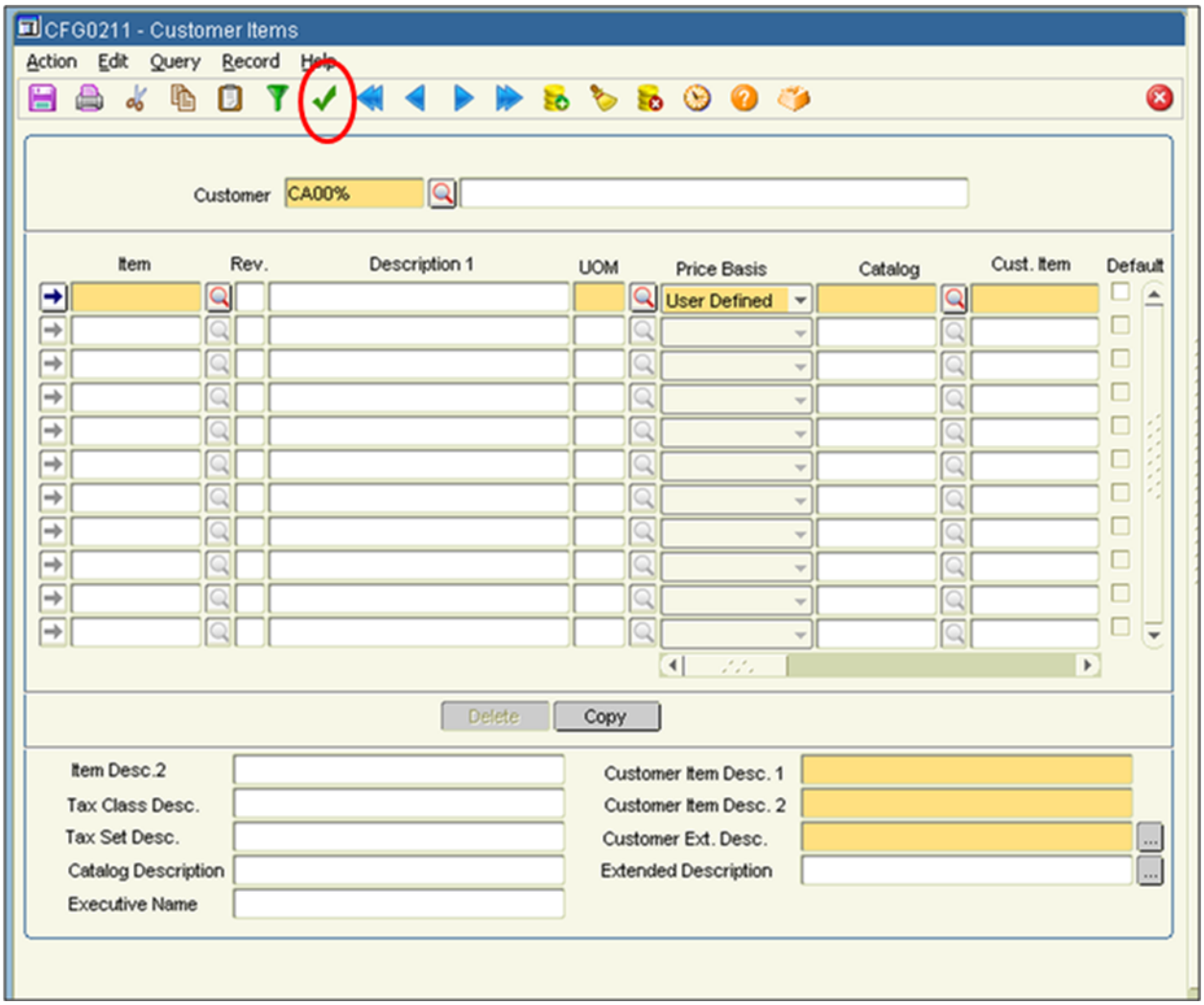



**Figure 1-19**

*Option II:*
Choose from menu.
Query \ Execute

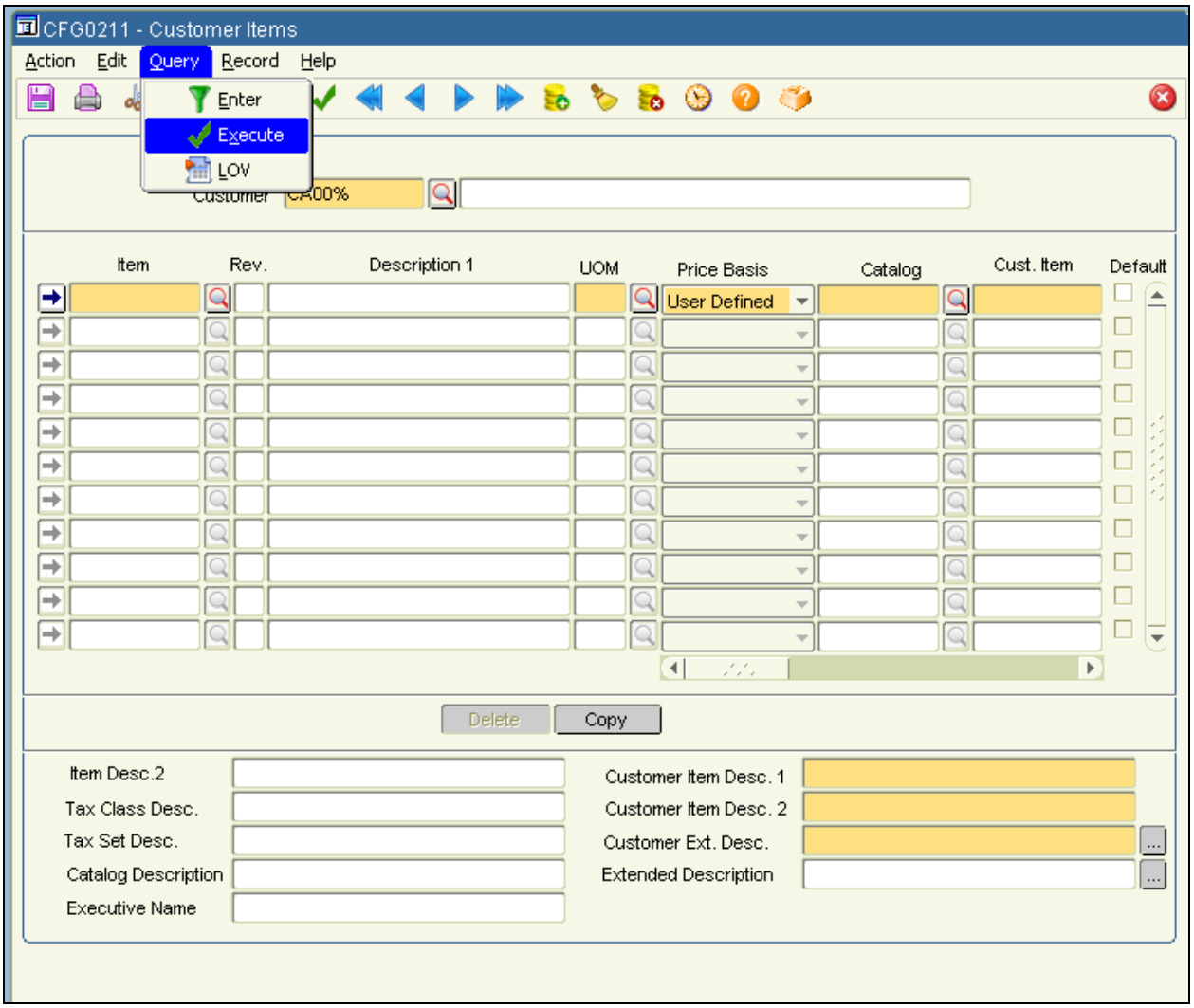



**Figure 1-20**

*Option III:*
Press Ctrl + F11

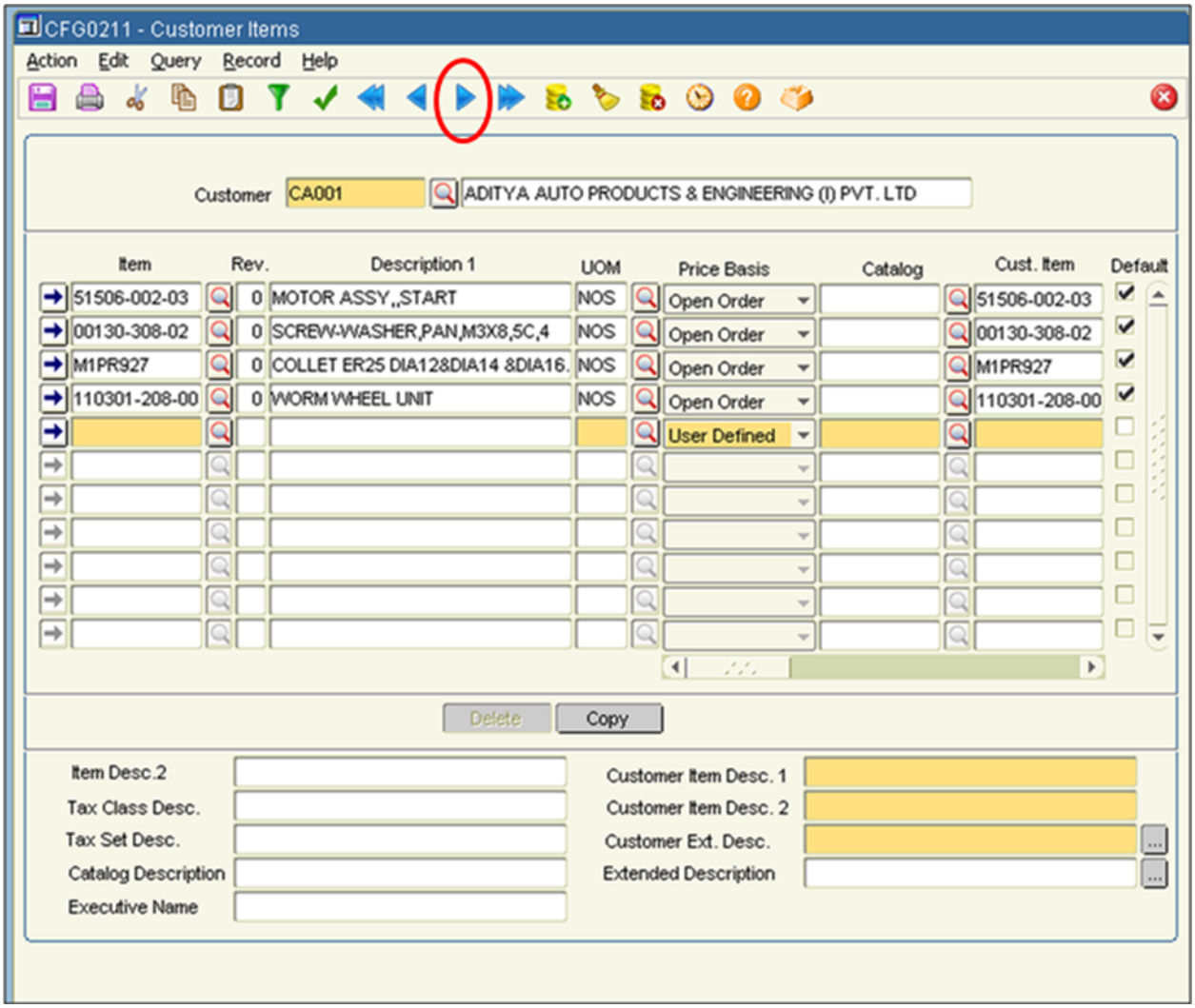
## How to navigate through the records

Click on the navigation icons for navigating through the queried set of data

**Move to the next record**

*Option I :*

Click on the icon


CFG0211 - Customer Items
Action Edit Query Record Help
Customer CA001 ADITYA AUTO PRODUCTS & ENGINEERING (I) PVT. LTD
Item Rev. Description 1 UOM Price Basis Catalog Cust. Item Default
51506-002-03 0 MOTOR ASSY,,START NOS Open Order 51506-002-03
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M1PR927 0 COLLET ER25 DIA12&DIA14 &DIA16. NOS Open Order M1PR927
110301-208-00 0 WORM WHEEL UNIT NOS Open Order 110301-208-00
User Defined
Delete Copy
Item Desc.2
Tax Class Desc.
Tax Set Desc.
Catalog Description
Executive Name
Customer Item Desc. 1
Customer Item Desc. 2
Customer Ext. Desc.
Extended Description

**Figure 1-21**

*Option II:*

Choose from the menu.
Record \ Next

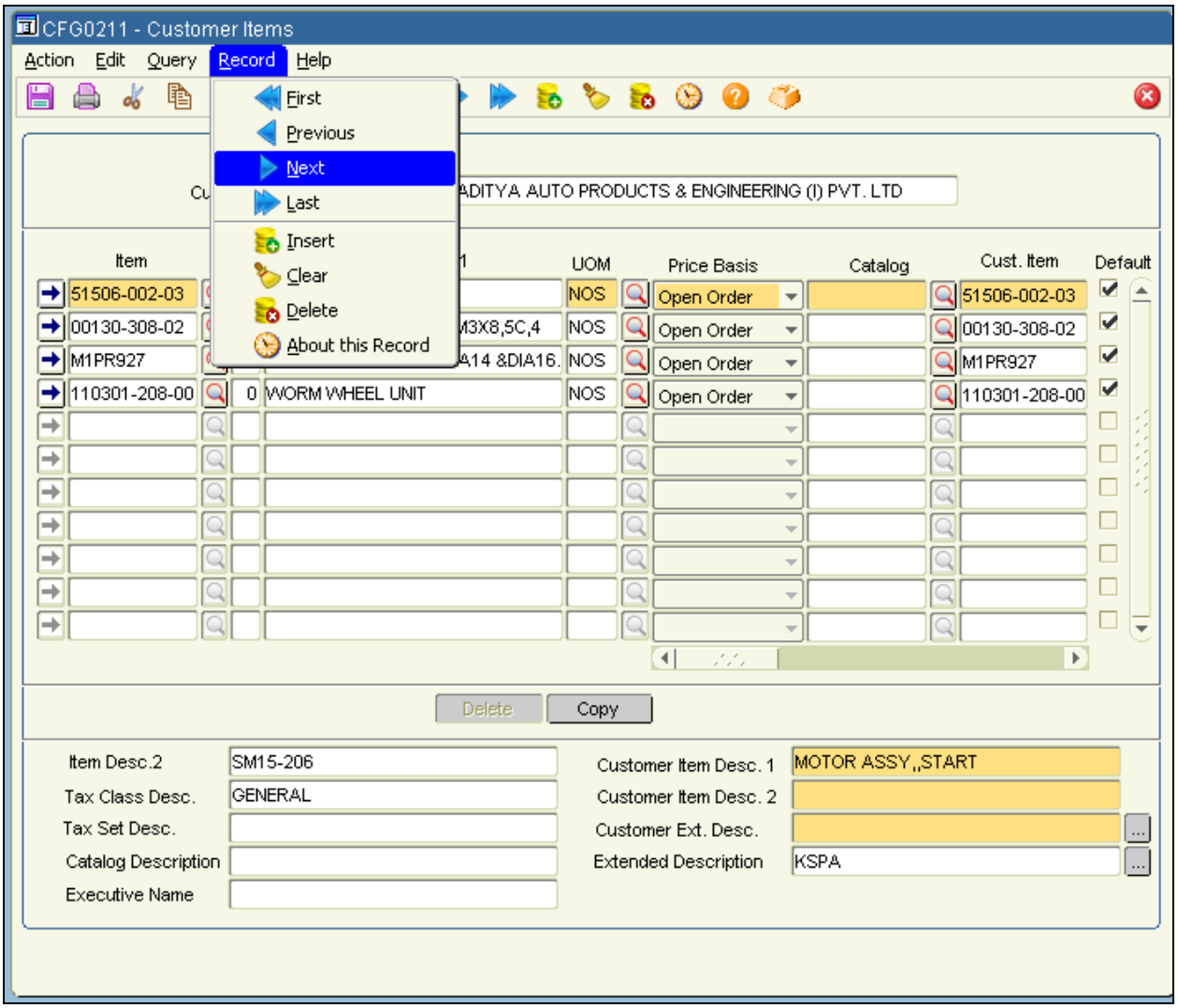



**Figure 1-22**

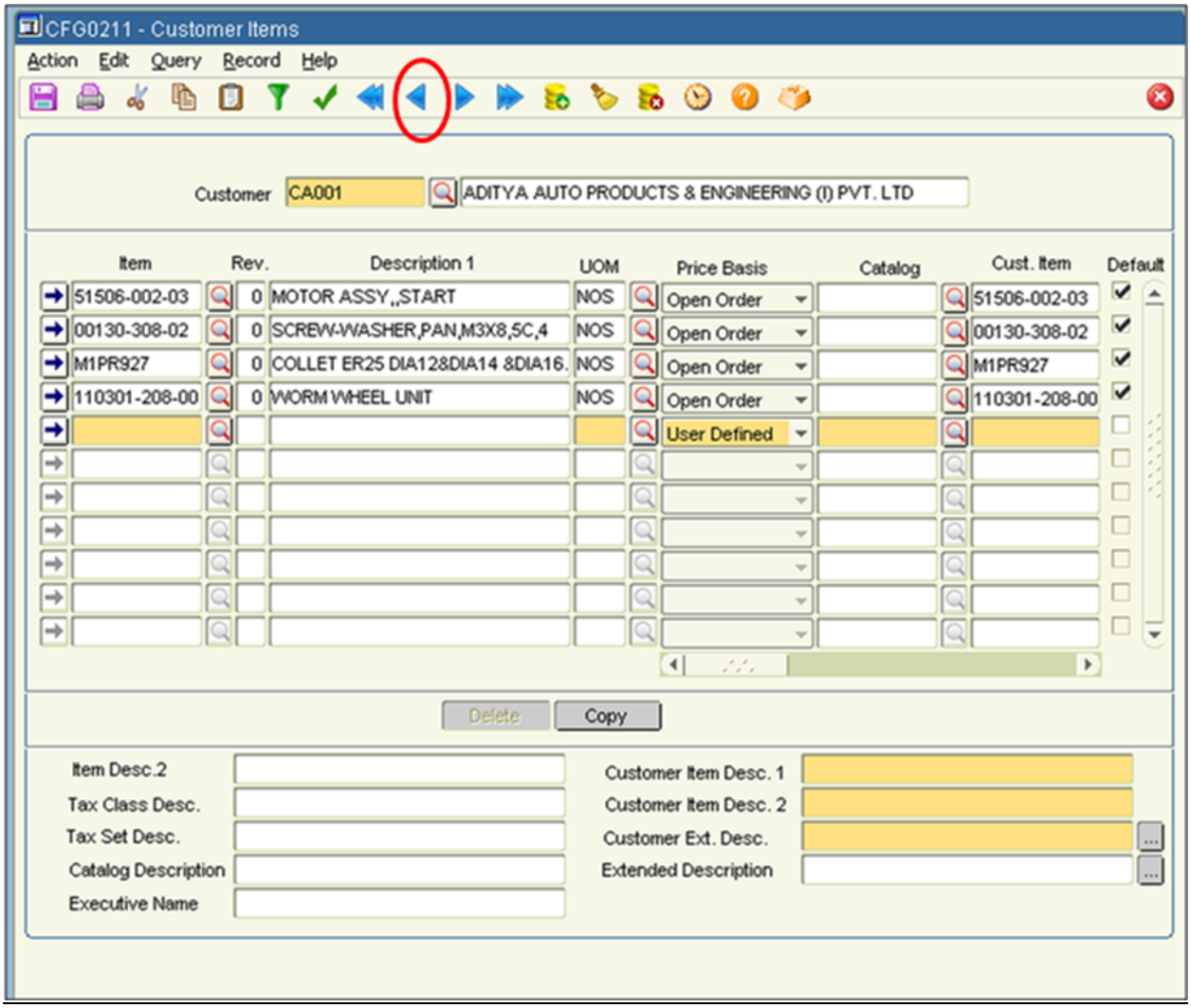
*Option III :*

Press the down key

**Move to the previous record**

*Option I :*

Click on the icon


CFG0211 - Customer Items
Action Edit Query Record Help
Customer CA001 ADITYA AUTO PRODUCTS & ENGINEERING (I) PVT. LTD
Item Rev. Description 1 UOM Price Basis Catalog Cust. Item Default
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110301-208-00 0 WORM WHEEL UNIT NOS Open Order 110301-208-00
User Defined
Delete
Copy
Item Desc.2
Tax Class Desc.
Tax Set Desc.
Catalog Description
Executive Name
Customer Item Desc. 1
Customer Item Desc. 2
Customer Ext. Desc.
Extended Description

**Figure 1-23**

*Option II :*

Choose from the menu.
Record \ Previous

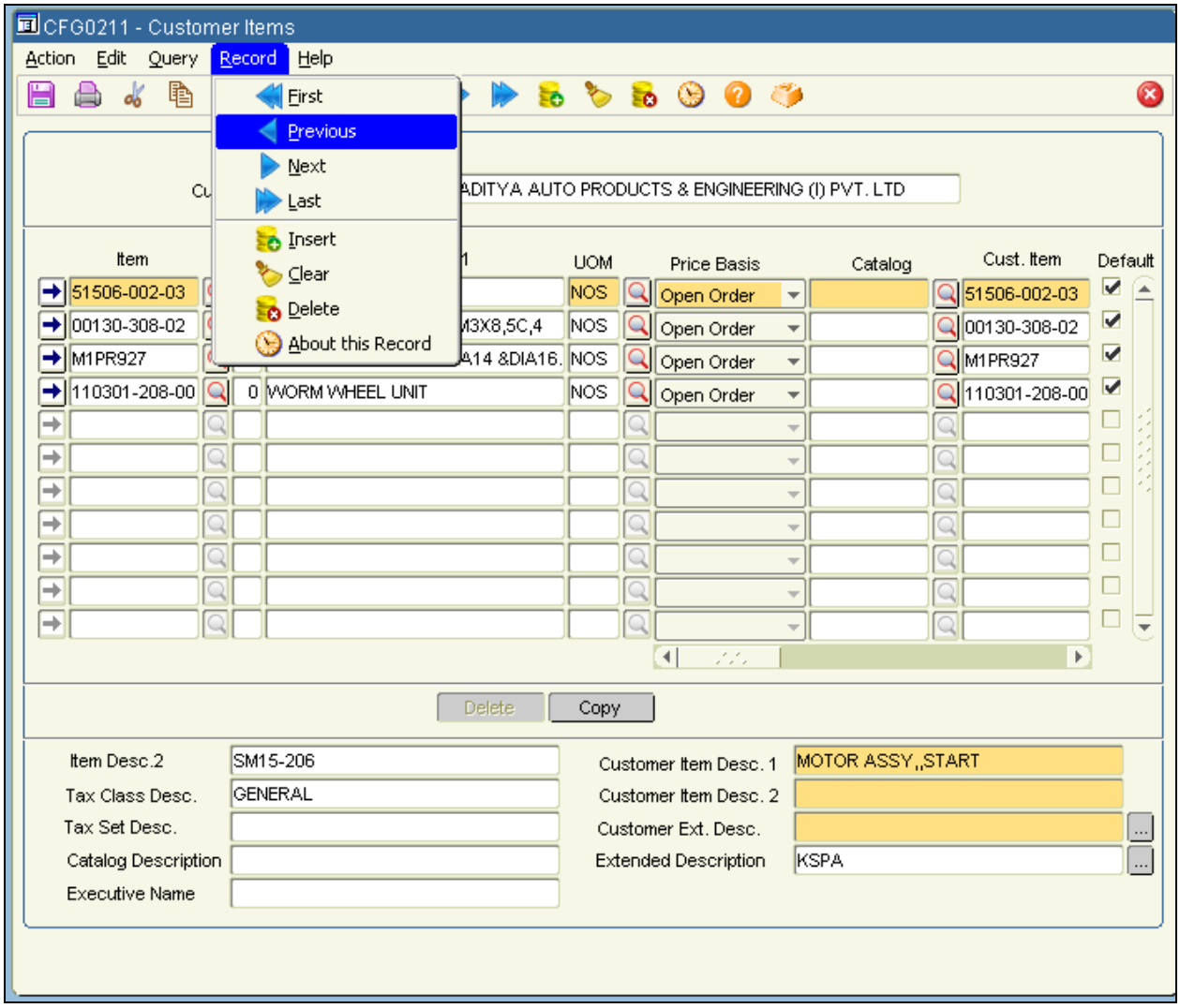



**Figure 1-24**

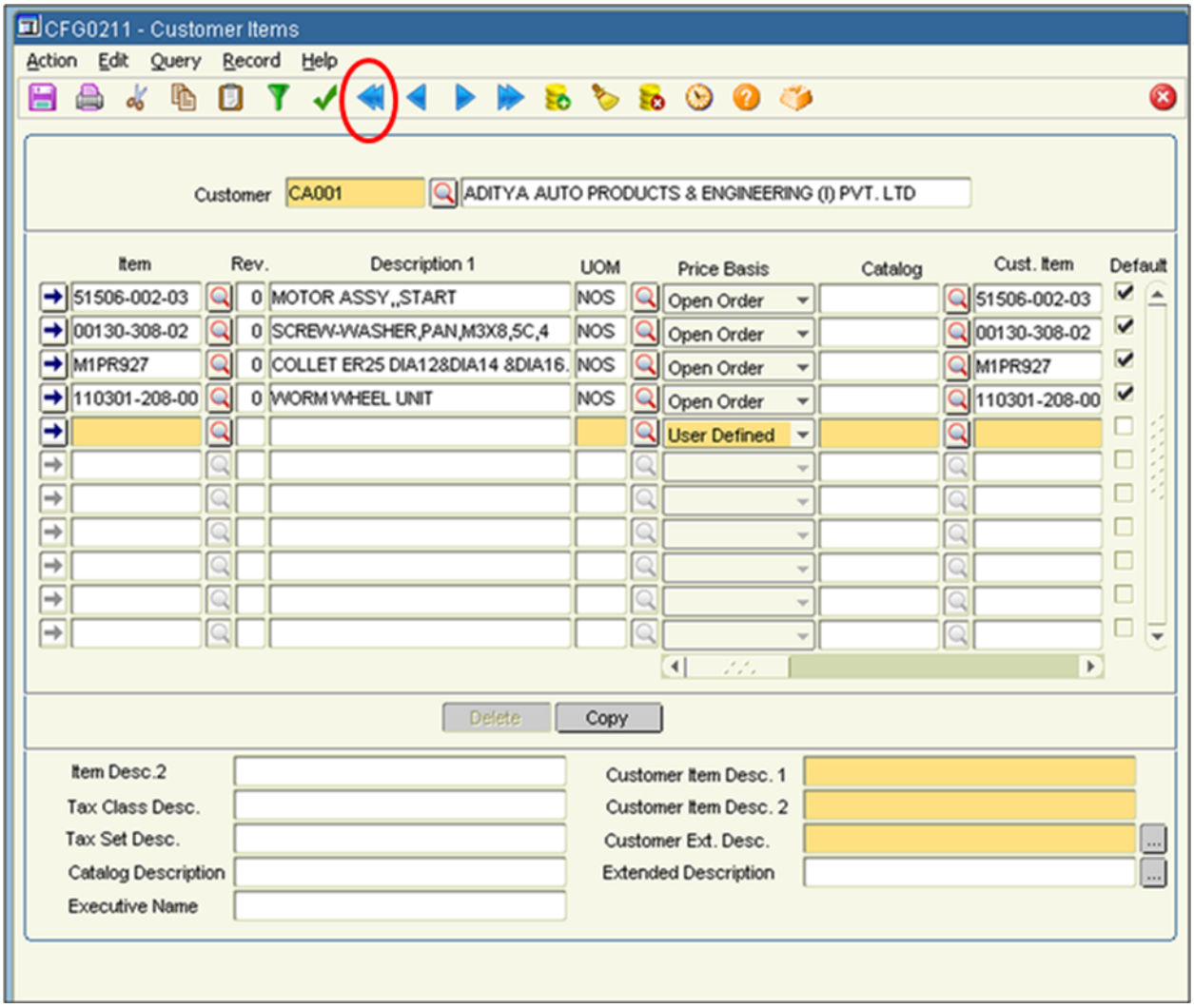
*Option III :*

Press the up key

**Move to the first record**

*Option I :*

Click on the icon


CFG0211 - Customer Items
Action Edit Query Record Help
Customer CA001 ADITYA AUTO PRODUCTS & ENGINEERING (I) PVT. LTD
Item Rev. Description 1 UOM Price Basis Catalog Cust. Item Default
51506-002-03 0 MOTOR ASSY,,START NOS Open Order 51506-002-03
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M1PR927 0 COLLET ER25 DIA12&DIA14 &DIA16. NOS Open Order M1PR927
110301-208-00 0 WORM WHEEL UNIT NOS Open Order 110301-208-00
User Defined
Delete
Copy
Item Desc.2
Tax Class Desc.
Tax Set Desc.
Catalog Description
Executive Name
Customer Item Desc. 1
Customer Item Desc. 2
Customer Ext. Desc.
Extended Description

**Figure 1-25**

*Option II :*

Choose from the menu.

Record \ First

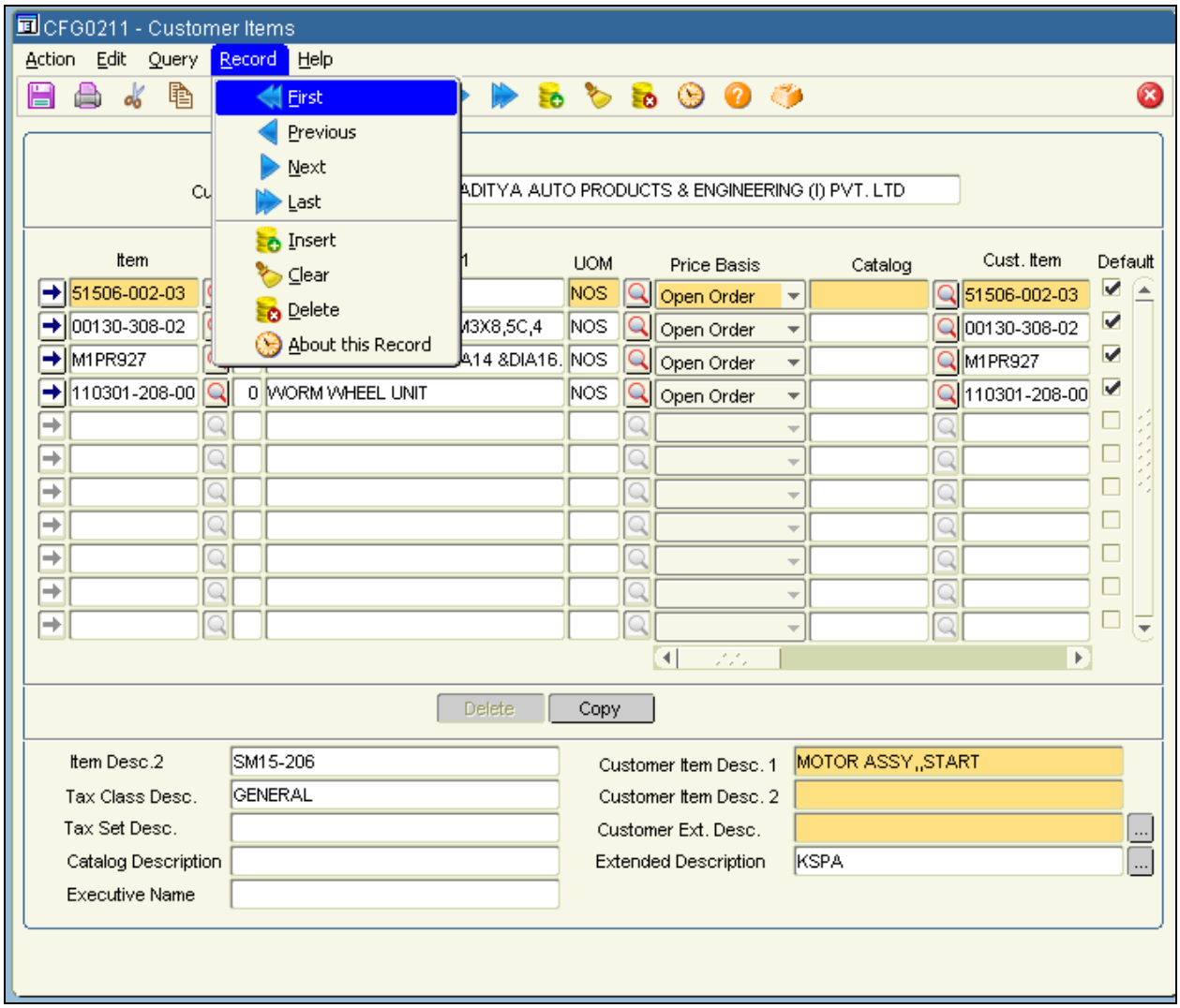
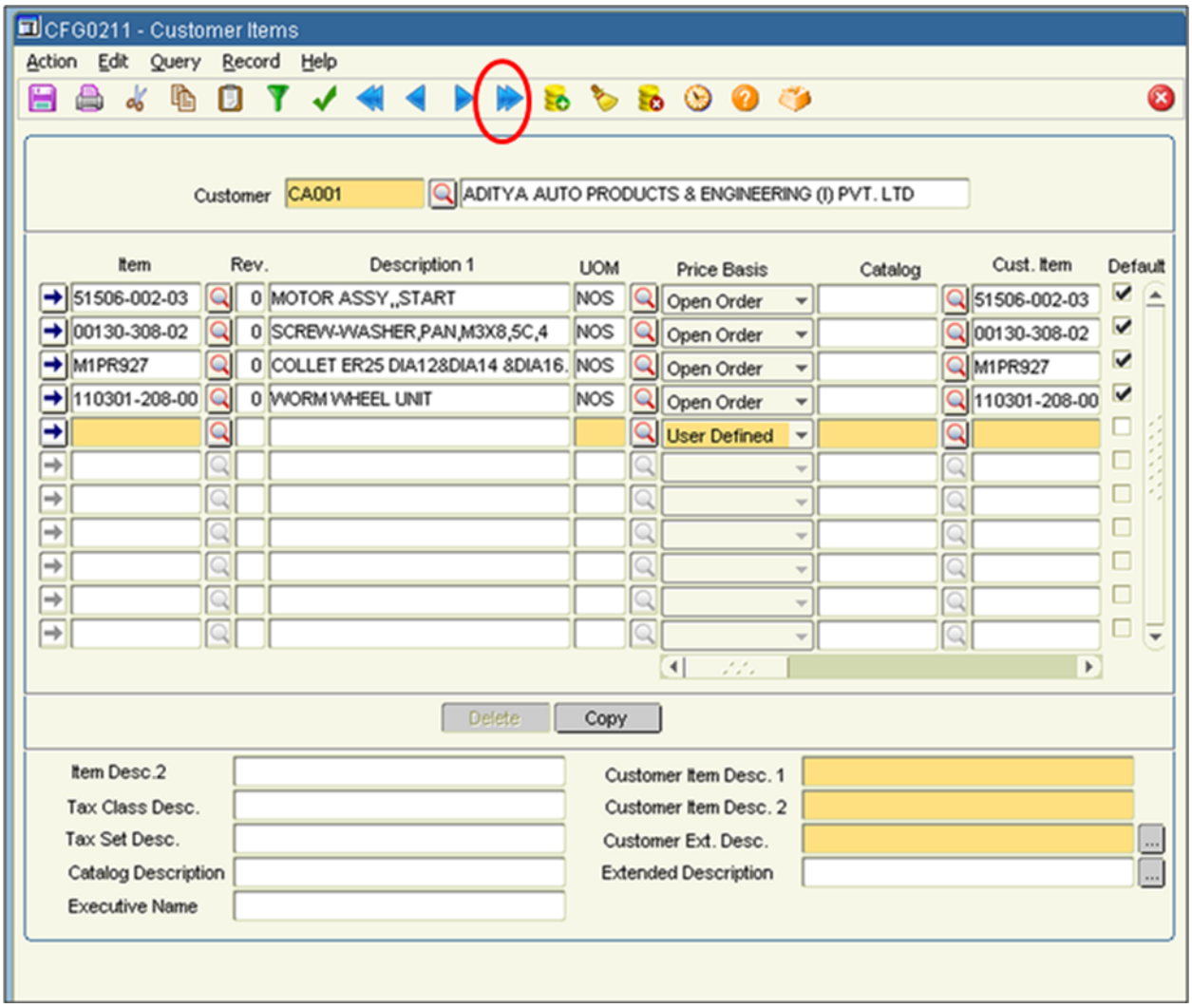

CFG0211 - Customer Items
Action
Edit
Query
Record
Help
First
Previous
Next
Last
Insert
Clear
Delete
About this Record
ADITYA AUTO PRODUCTS & ENGINEERING (I) PVT. LTD
Item
UOM
Price Basis
Catalog
Cust. Item
Default
51506-002-03
NOS
Open Order
51506-002-03
00130-308-02
M3X8,5C,4
NOS
Open Order
00130-308-02
M1PR927
A14 &DIA16.
NOS
Open Order
M1PR927
110301-208-00
0
WORM WHEEL UNIT
NOS
Open Order
110301-208-00
Delete
Copy
Item Desc.2
SM15-206
Tax Class Desc.
GENERAL
Tax Set Desc.
Catalog Description
Executive Name
Customer Item Desc. 1
MOTOR ASSY,,START
Customer Item Desc. 2
Customer Ext. Desc.
Extended Description
KSPA

**Figure 1-26**

**Move to the last record**

*Option I :*

Click on the icon


CFG0211 - Customer Items
Action Edit Query Record Help
Customer CA001 ADITYA AUTO PRODUCTS & ENGINEERING (I) PVT. LTD
Item Rev. Description 1 UOM Price Basis Catalog Cust. Item Default
51506-002-03 0 MOTOR ASSY,,START NOS Open Order 51506-002-03
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M1PR927 0 COLLET ER25 DIA12&DIA14 &DIA16. NOS Open Order M1PR927
110301-208-00 0 WORM WHEEL UNIT NOS Open Order 110301-208-00
User Defined
Delete
Copy
Item Desc.2
Tax Class Desc.
Tax Set Desc.
Catalog Description
Executive Name
Customer Item Desc. 1
Customer Item Desc. 2
Customer Ext. Desc.
Extended Description

**Figure 1-27**

*Option II :*

Choose from the menu.

Record \ Last

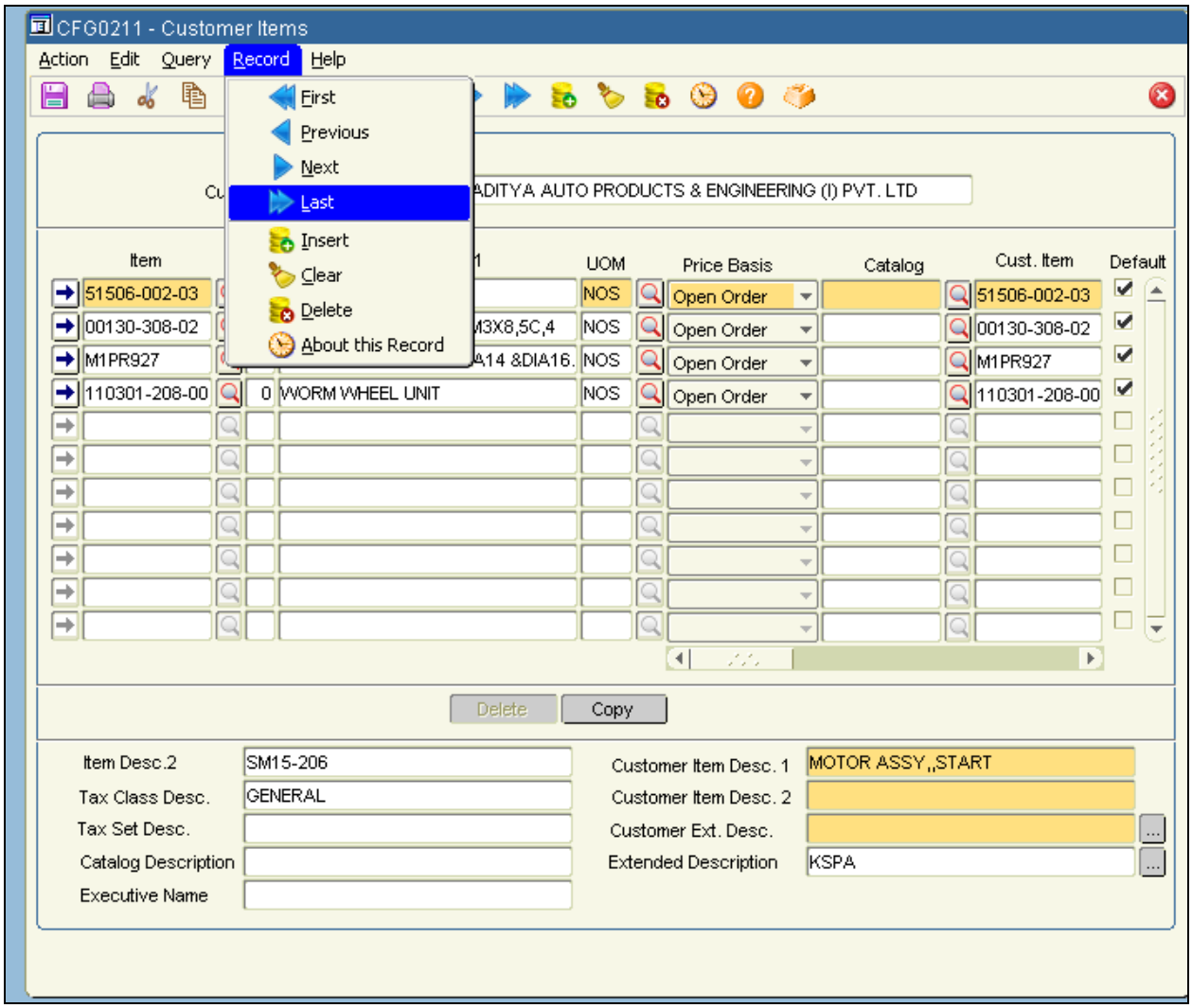
CFG0211 - Customer Items
Action
Edit
Query
Record
Help
First
Previous
Next
Last
Insert
Clear
Delete
About this Record
ADITYA AUTO PRODUCTS & ENGINEERING (I) PVT. LTD
Item
UOM
Price Basis
Catalog
Cust. Item
Default
51506-002-03
NOS
Open Order
51506-002-03
00130-308-02
NOS
Open Order
00130-308-02
M1PR927
NOS
Open Order
M1PR927
110301-208-00
0
WORM WHEEL UNIT
NOS
Open Order
110301-208-00
Delete
Copy
Item Desc.2
SM15-206
Tax Class Desc.
GENERAL
Tax Set Desc.
Catalog Description
Executive Name
Customer Item Desc. 1
MOTOR ASSY,,START
Customer Item Desc. 2
Customer Ext. Desc.
Extended Description
KSPA

**Figure 1-28**

## Modify the data

**Step 1:**
Query the data to be modified. (Refer: How to query)

**Step 2:**
Make the required changes.

**Step 3:**
Save the record.

## Delete the data

Following are the steps for deleting a data.
**Step 1:**
Query the data to be deleted. (Refer: How to query)

**Step 2:**
The record can be deleted using one of the following options

*Option I :*

Click on the icon

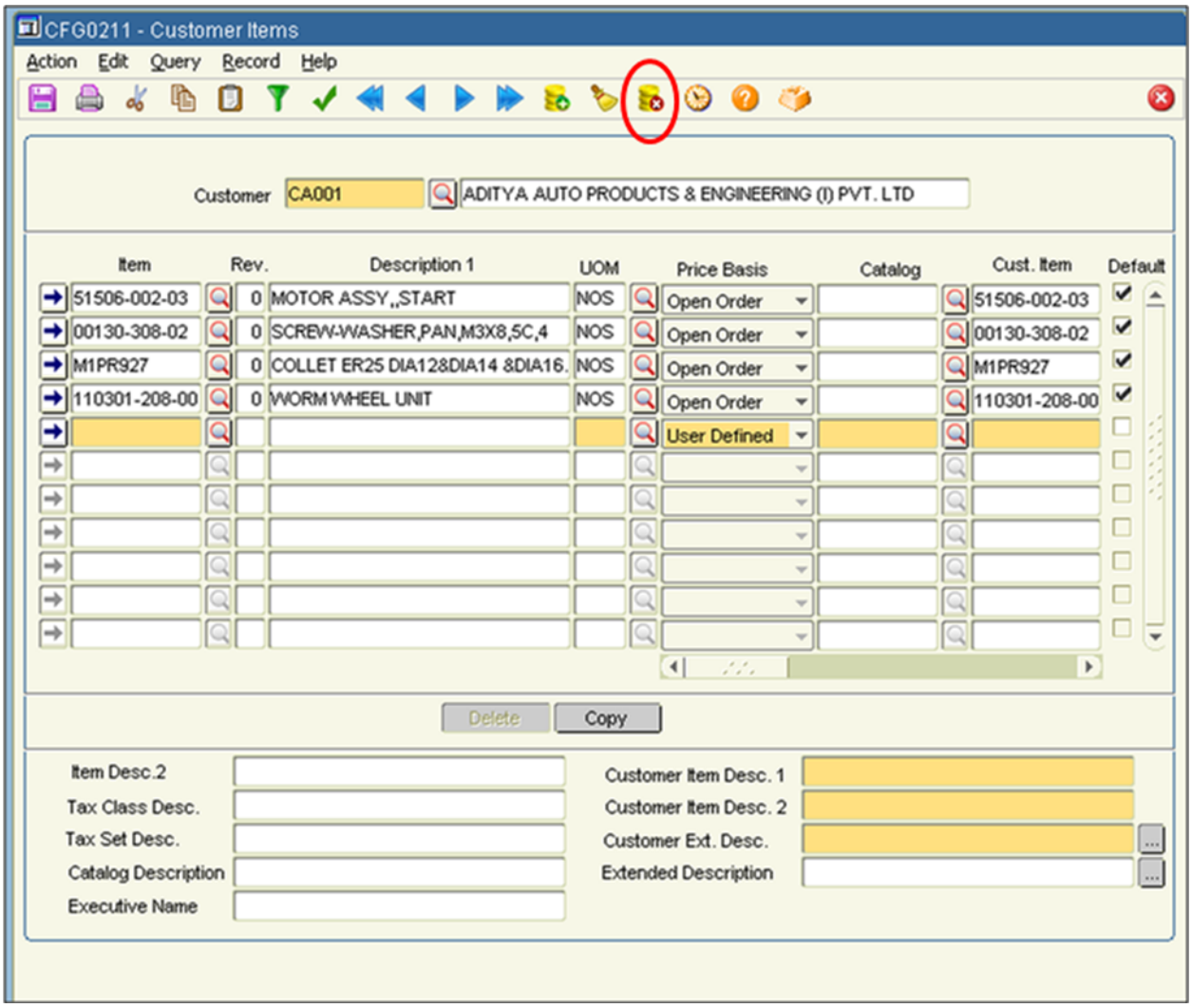
CFG0211 - Customer Items
Action Edit Query Record Help
Customer CA001 ADITYA AUTO PRODUCTS & ENGINEERING (I) PVT. LTD
Item Rev. Description 1 UOM Price Basis Catalog Cust. Item Default
51506-002-03 0 MOTOR ASSY,,START NOS Open Order 51506-002-03
00130-308-02 0 SCREW-WASHER,PAN,M3X8,5C,4 NOS Open Order 00130-308-02
M1PR927 0 COLLET ER25 DIA12&DIA14 &DIA16. NOS Open Order M1PR927
110301-208-00 0 WORM WHEEL UNIT NOS Open Order 110301-208-00
User Defined
Delete
Copy
Item Desc.2
Tax Class Desc.
Tax Set Desc.
Catalog Description
Executive Name
Customer Item Desc. 1
Customer Item Desc. 2
Customer Ext. Desc.
Extended Description

**Figure 1-29**

*Option II :*
Choose from the menu
Record \ Delete

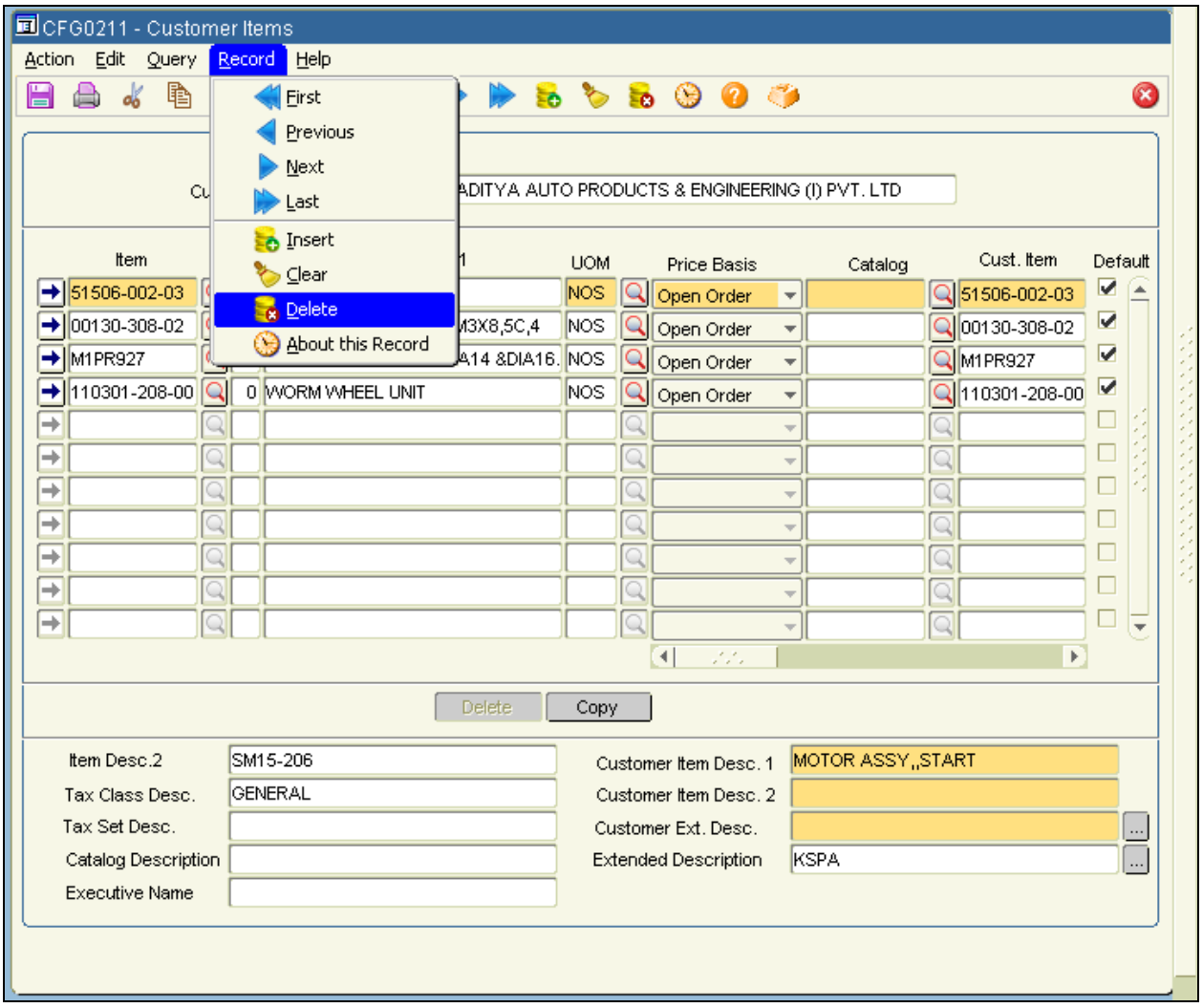


**Figure 1-30**

*Option III :*
Press Ctrl + Up

## Clear

This is used to clear the record of current block. It is used to clear all the text fields at a time. Also used to cancel the enter query mode in the form.

*Option I :*
Click on the clear icon

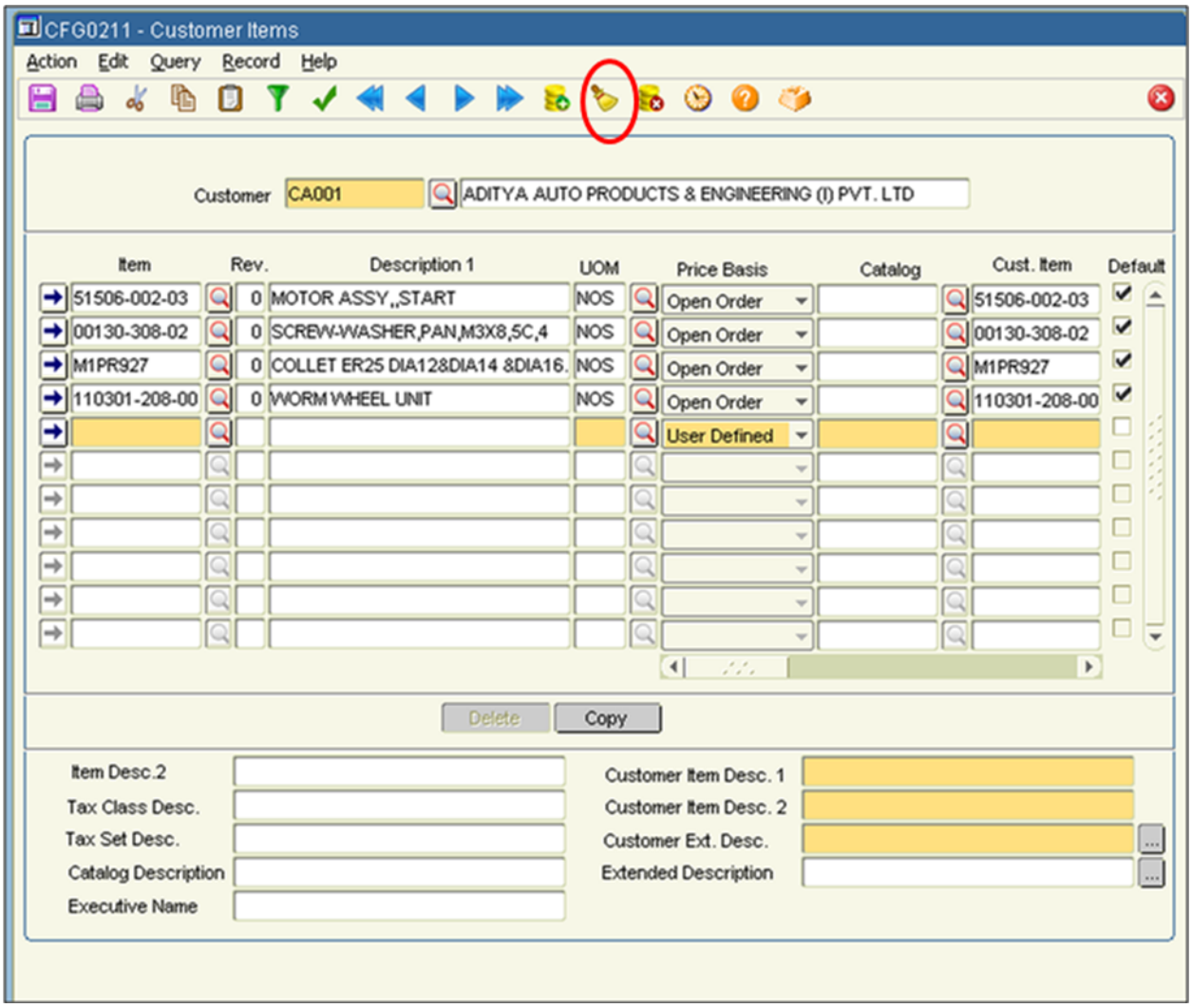
CFG0211 - Customer Items
Action Edit Query Record Help
Customer CA001 ADITYA AUTO PRODUCTS & ENGINEERING (I) PVT. LTD
Item Rev. Description 1 UOM Price Basis Catalog Cust. Item Default
51506-002-03 0 MOTOR ASSY,,START NOS Open Order 51506-002-03
00130-308-02 0 SCREW-WASHER,PAN,M3X8,5C,4 NOS Open Order 00130-308-02
M1PR927 0 COLLET ER25 DIA12&DIA14 &DIA16. NOS Open Order M1PR927
110301-208-00 0 WORM WHEEL UNIT NOS Open Order 110301-208-00
User Defined
Delete Copy
Item Desc.2
Tax Class Desc.
Tax Set Desc.
Catalog Description
Executive Name
Customer Item Desc. 1
Customer Item Desc. 2
Customer Ext. Desc.
Extended Description

**Figure 1-31**

*Option II :*
Choose from the menu
Record \ Clear

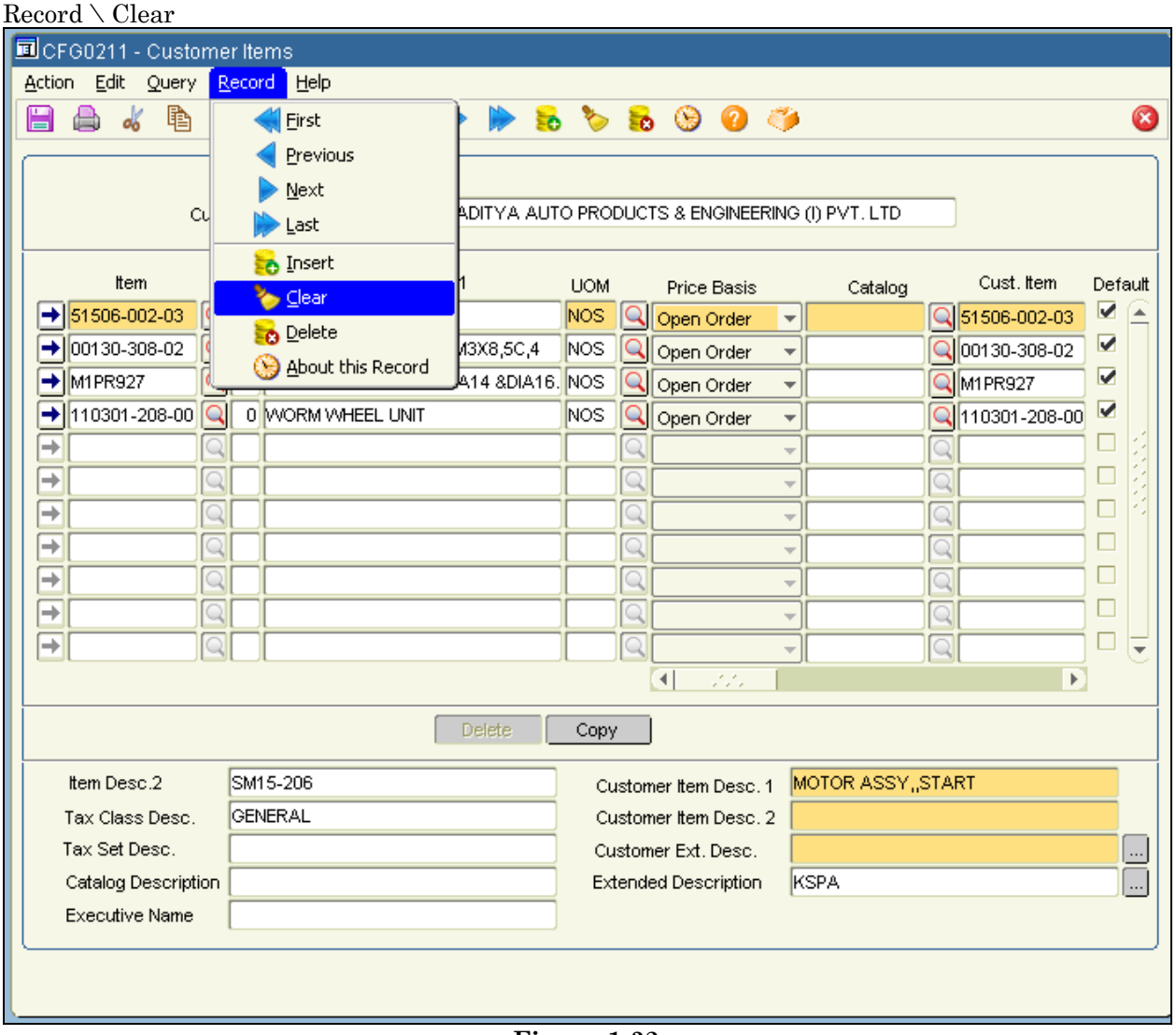


**Figure 1-32**

# How to use LOV

Choose value from LOV
**Step 1:**
*Option I :*
Click on the icon

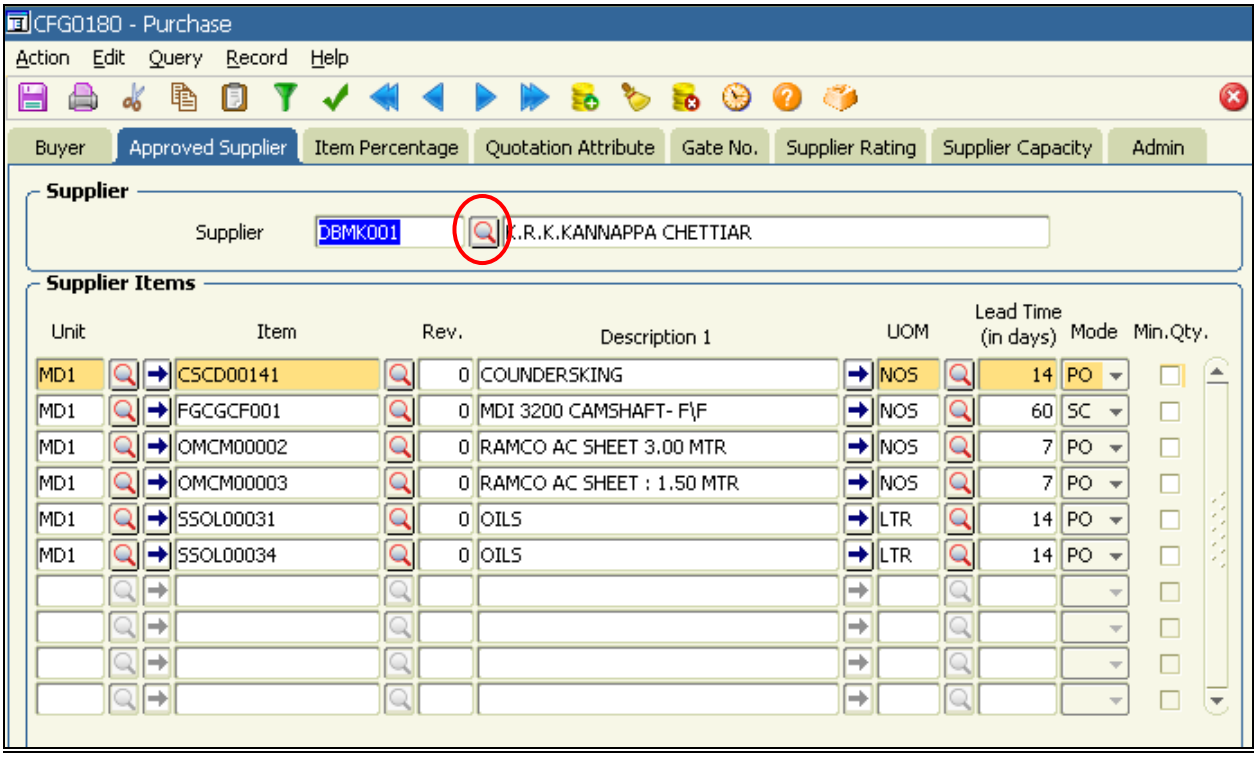


**Figure 1-33**

*Option III :*
Choose from menu.
Query \ LOV

A popup window will appear with the list of values.

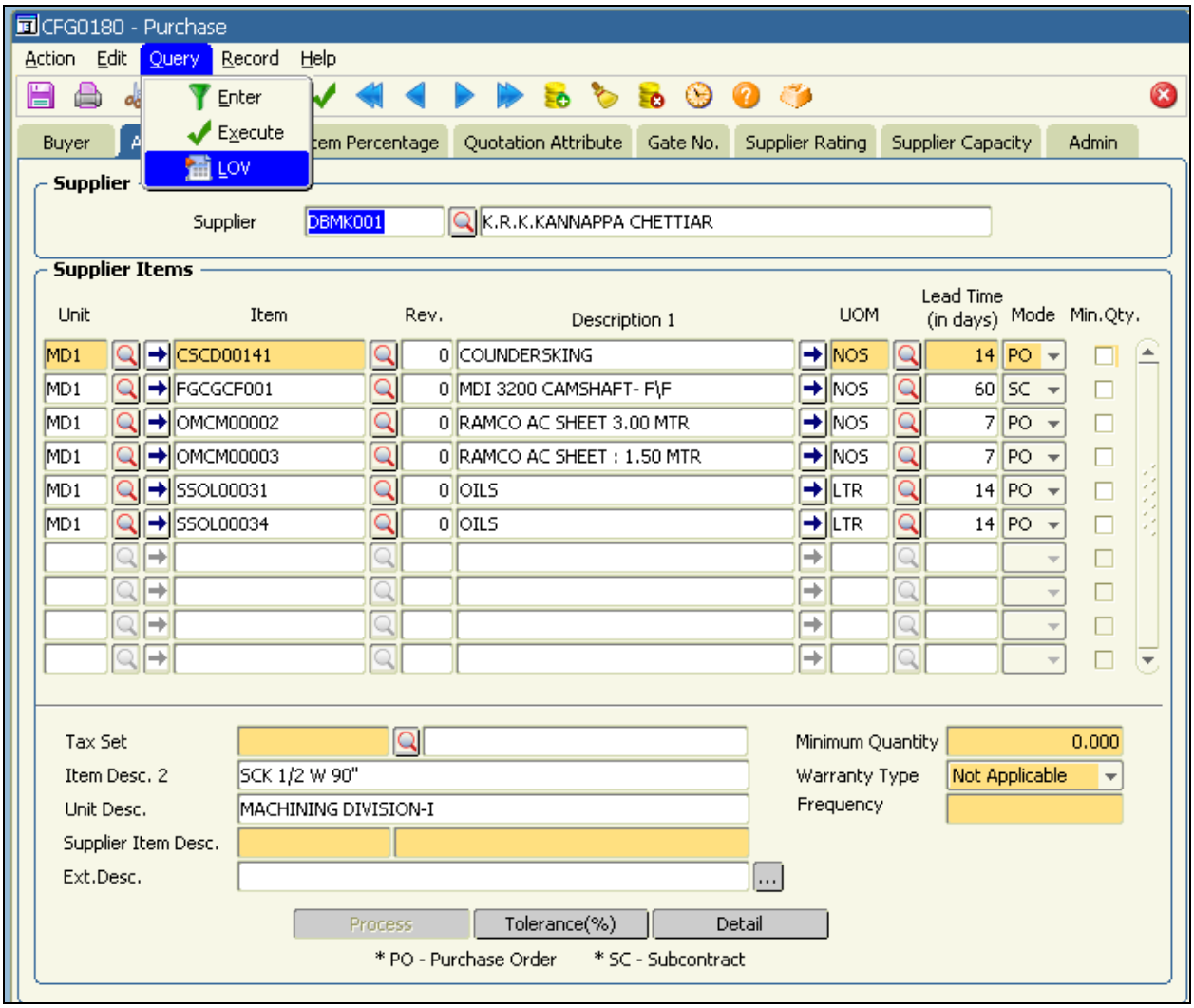
CFG0180 - Purchase
Action Edit Query Record Help
Enter
Execute
LOV
Buyer
Quotation Attribute
Gate No.
Supplier Rating
Supplier Capacity
Admin
Supplier
Supplier DBMK001 K.R.K.KANNAPPA CHETTIAR
Supplier Items
Unit Item Rev. Description 1 UOM Lead Time (in days) Mode Min.Qty.
MD1 CSCD00141 0 COUNDERSKING NOS 14 PO
MD1 FGCGCF001 0 MDI 3200 CAMSHAFT- F\F NOS 60 SC
MD1 OMCM00002 0 RAMCO AC SHEET 3.00 MTR NOS 7 PO
MD1 OMCM00003 0 RAMCO AC SHEET : 1.50 MTR NOS 7 PO
MD1 SSOL00031 0 OILS LTR 14 PO
MD1 SSOL00034 0 OILS LTR 14 PO
Tax Set
Item Desc. 2 SCK 1/2 W 90"
Unit Desc. MACHINING DIVISION-I
Supplier Item Desc.
Ext.Desc.
Minimum Quantity 0.000
Warranty Type Not Applicable
Frequency
Process
Tolerance(%)
Detail
* PO - Purchase Order * SC - Subcontract

**Figure 1-34**

**Step 2:**

**Choose a data from LOV**

*Option I:*

Double click on the required line.

*Option II:*

Place the cursor on the line and click on the **OK** button.

The popup window will disappear and the chosen data will appear in the text field.

**Find a value in LOV**

**Step 1:**

Type the search criteria in the **Find** text field and click on **Find** button.

The wildcard search can also be performed.

**Step 2:**

When the required data is found choose the value (Refer: How to choose from LOV)

*Option III :*

Press Ctrl + L.

## How to use Calendar

In the date fields, we have two options to enter a date. We can manually type the date or we can use the calendar icon to select a date from the calendar.

The applications calendar can be used as follows.

*Option I:*
Click on the icon next to the date field.
A calendar will appear.
Click on the required date.

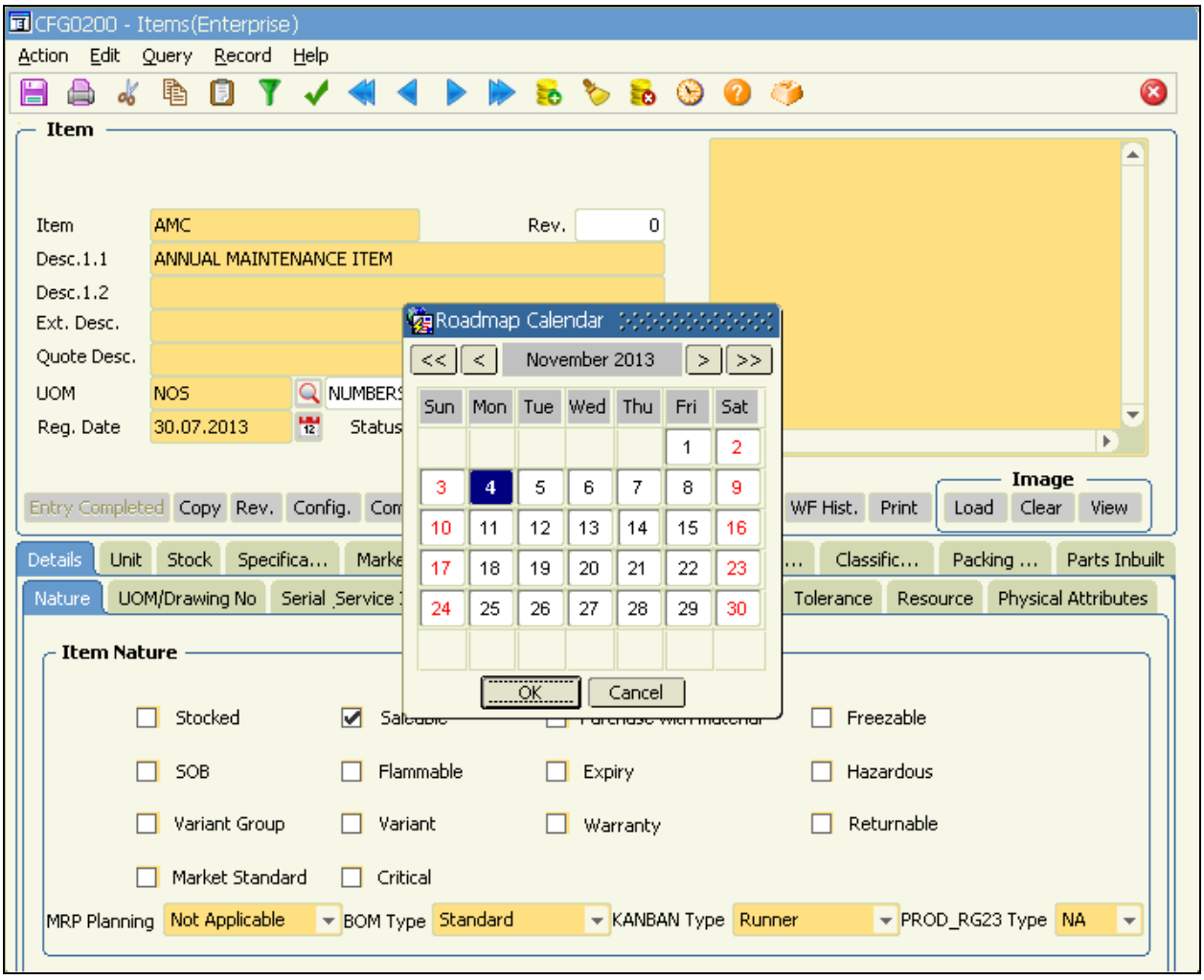
CFG0200 - Items(Enterprise)
Action Edit Query Record Help
Item
Item AMC Rev. 0
Desc.1.1 ANNUAL MAINTENANCE ITEM
Desc.1.2
Ext. Desc.
Quote Desc.
UOM NOS
Reg. Date 30.07.2013
Status
Roadmap Calendar
<< < November 2013 > >>
Sun Mon Tue Wed Thu Fri Sat
1 2
3 4 5 6 7 8 9
10 11 12 13 14 15 16
17 18 19 20 21 22 23
24 25 26 27 28 29 30
OK Cancel
Entry Completed Copy Rev. Config.
WF Hist. Print
Image Load Clear View
Details Unit Stock Specifica... Classific... Packing ... Parts Inbuilt
Nature UOM/Drawing No Tolerance Resource Physical Attributes
Item Nature
Stocked Freezable
SOB Flammable Expiry Hazardous
Variant Group Variant Warranty Returnable
Market Standard Critical
MRP Planning Not Applicable BOM Type Standard KANBAN Type Runner PROD_RG23 Type NA

**Figure 1-35**

*Option II:*
Choose from the menu.
Help \ Calendar.

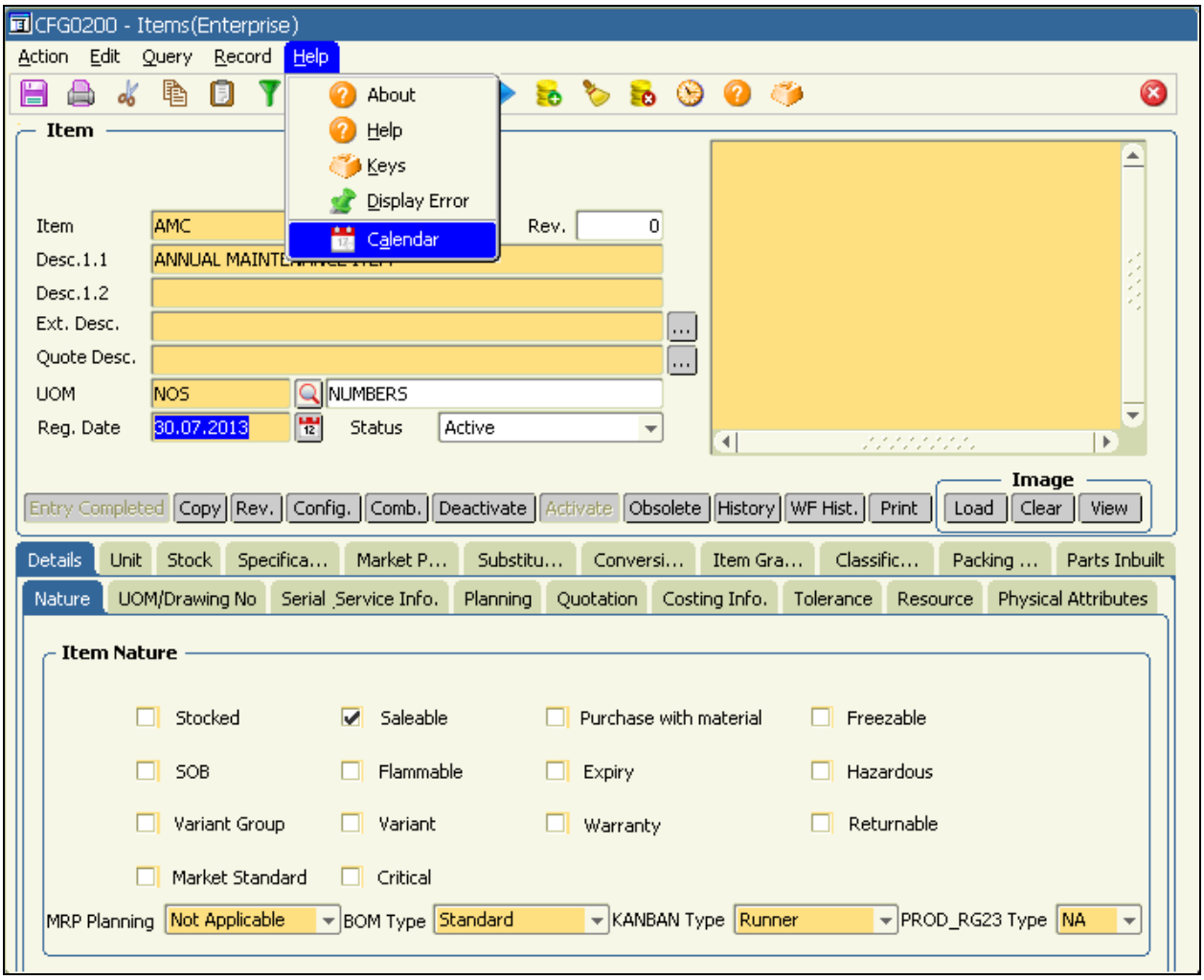
CFG0200 - Items(Enterprise)
Action
Edit
Query
Record
Help
About
Help
Keys
Display Error
Calendar
Item
Item
AMC
Rev.
0
Desc.1.1
Desc.1.2
Ext. Desc.
Quote Desc.
UOM
NOS
NUMBERS
Reg. Date
30.07.2013
Status
Active
Image
Entry Completed
Copy
Rev.
Config.
Comb.
Deactivate
Activate
Obsolete
History
WF Hist.
Print
Load
Clear
View
Details
Unit
Stock
Specifica...
Market P...
Substitu...
Conversi...
Item Gra...
Classific...
Packing ...
Parts Inbuilt
Nature
UOM/Drawing No
Serial
Service Info.
Planning
Quotation
Costing Info.
Tolerance
Resource
Physical Attributes
Item Nature
Stocked
Saleable
Purchase with material
Freezable
SOB
Flammable
Expiry
Hazardous
Variant Group
Variant
Warranty
Returnable
Market Standard
Critical
MRP Planning
Not Applicable
BOM Type
Standard
KANBAN Type
Runner
PROD_RG23 Type
NA

**Figure 1-36**

For example, to enter the start date of the employee

1. Click on the calendar icon.
2. A calendar will open.
3. Click on the desired date.
4. Click on the **OK** button.
5. The date will appear in the text field.

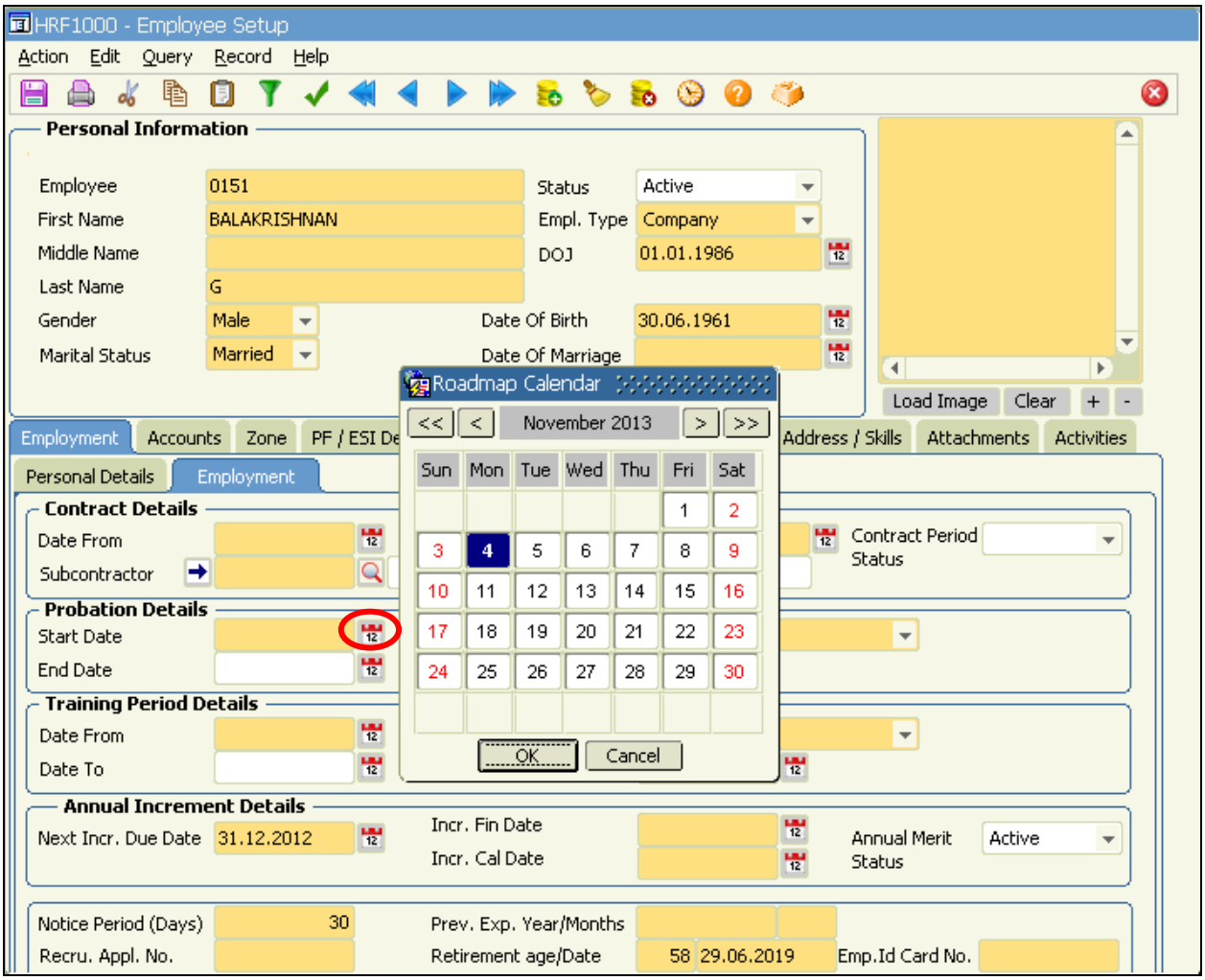


**Figure 1 -37**

## How to view Workflow

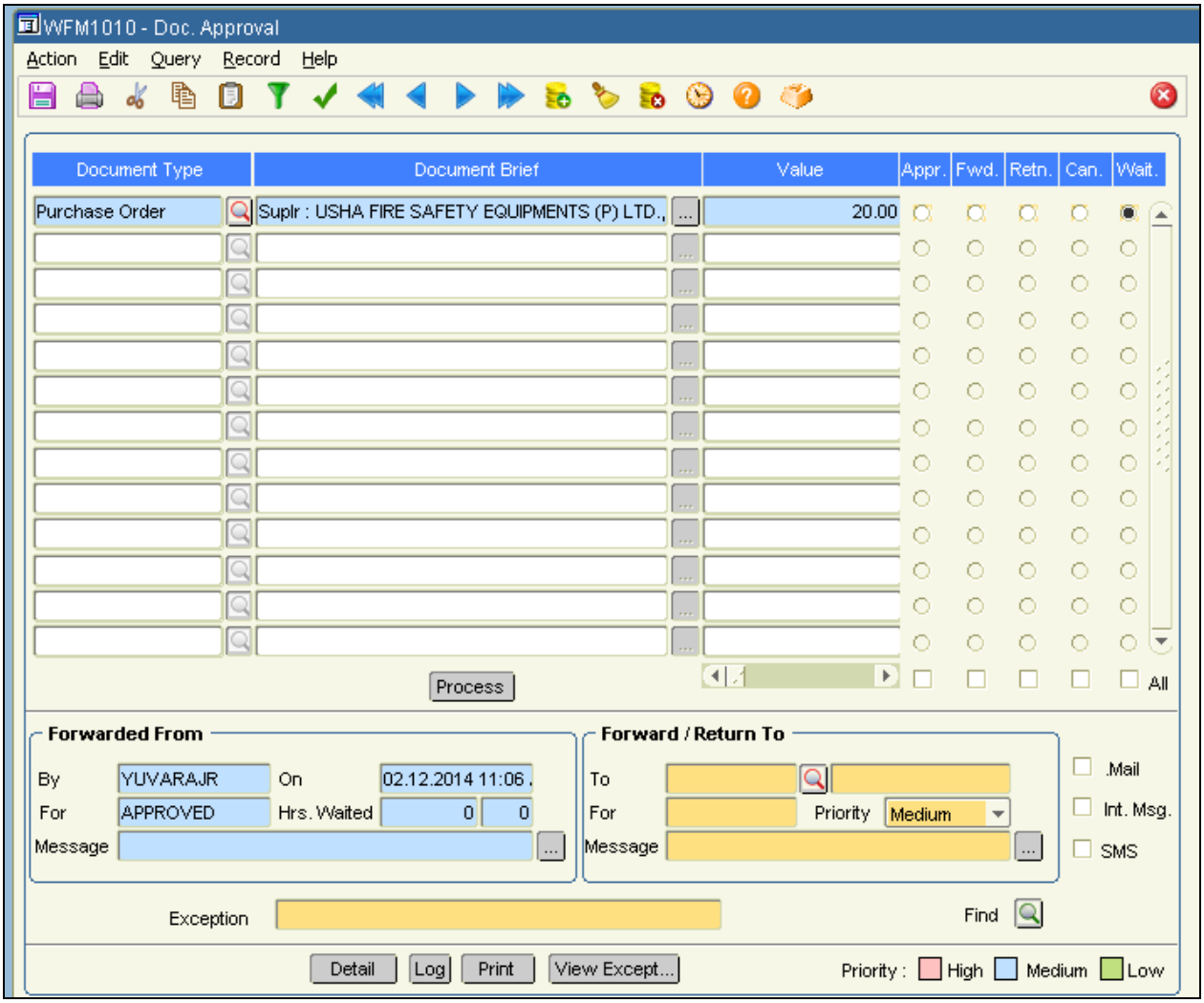


**Figure 1-38**

All the workflow activities can be done through this screen.

## How to view messages

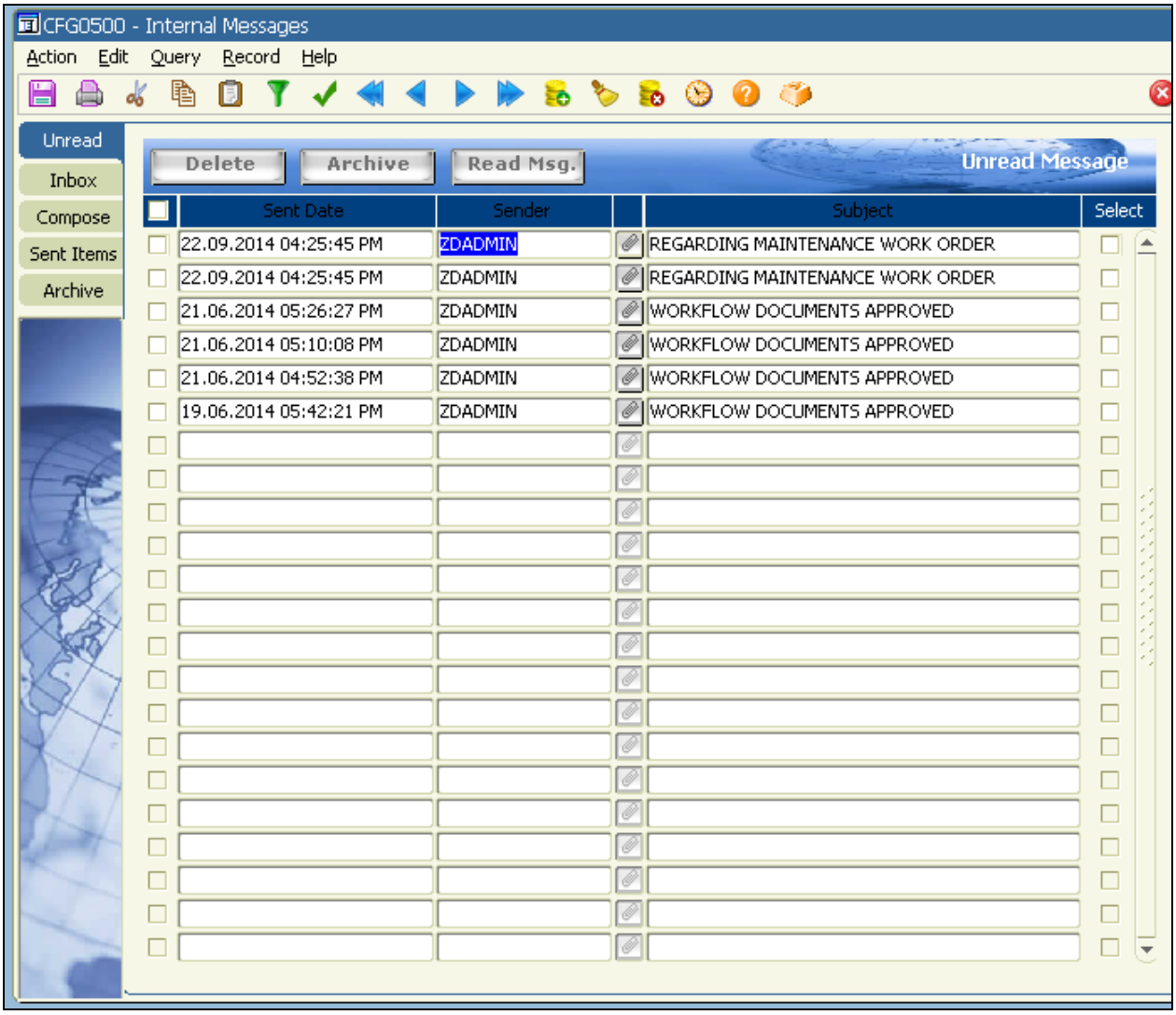


**Figure 1-39**

All the messages can be viewed from this screen.
Internal Messages will be sent for approval of Workflow documents
The Inbox contains following columns

a. Sent Date
b. Sender
c. Subject

Read Msg button will give the full details of the message.

The Messages can be archived using the Archive button

## How to view Activities

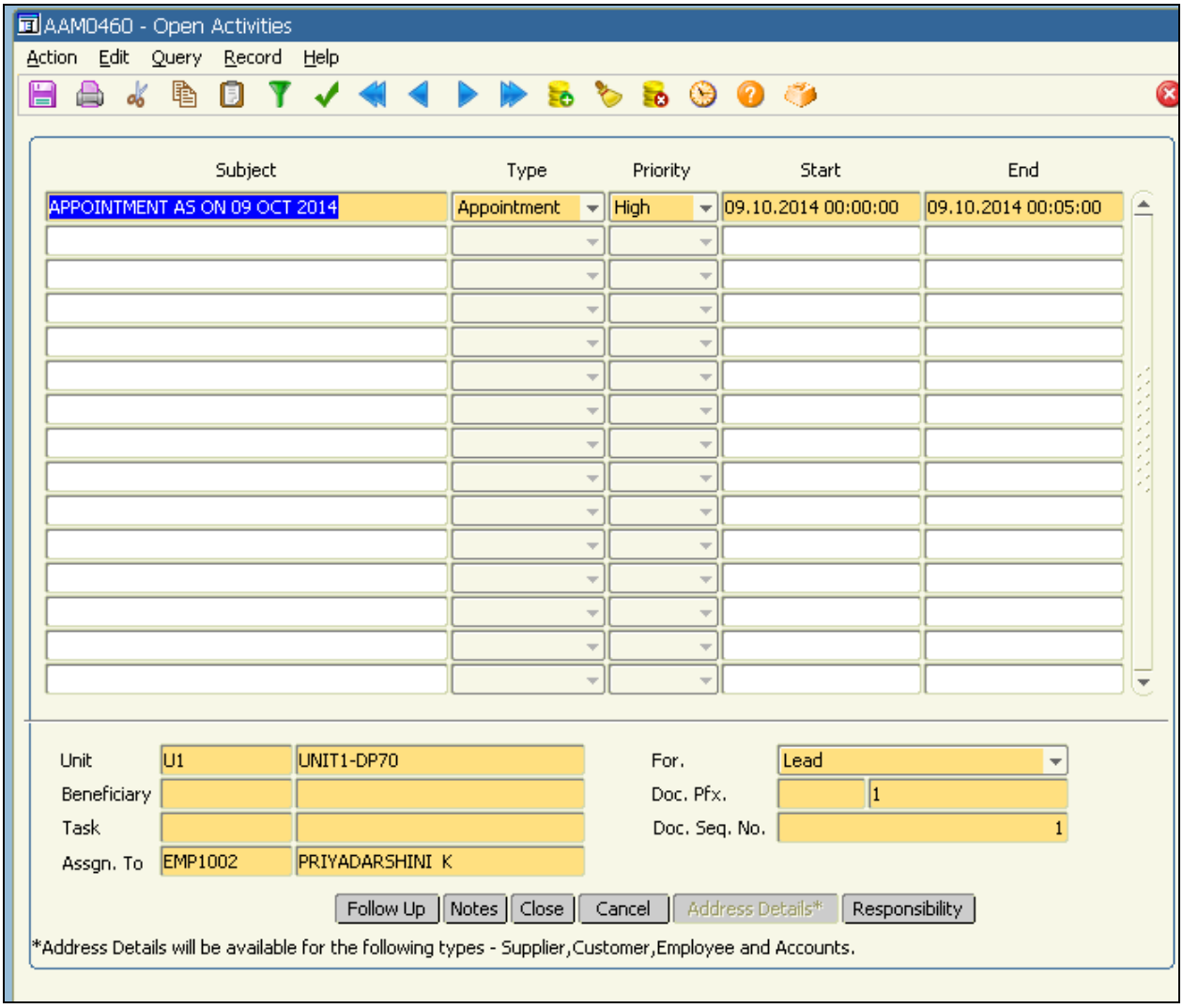


**Figure 1-40**

All the Activities can be viewed from this screen.

The following five Activities can be done using this screen

a. Task
b. Appointment
c. Fax
d. Phone
e. Email
f. Letter

These Activities can be activated using the Activate button.

Follow up can be done for the Open Activities and it can be closed by proving the proper Close reason

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